

1975

Applicability of Selected American Written Business Communication Principles Across Cultural Boundaries With Particular Reference to Mexico.

Jack Douglas Eure Jr

Louisiana State University and Agricultural & Mechanical College

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APPLICABILITY OF SELECTED AMERICAN WRITTEN
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REFERENCE TO MEXICO.

The Louisiana State University and
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APPLICABILITY OF SELECTED AMERICAN WRITTEN BUSINESS
COMMUNICATION PRINCIPLES ACROSS CULTURAL
BOUNDARIES WITH PARTICULAR
REFERENCE TO MEXICO

A Dissertation

Submitted to the Graduate Faculty of the
Louisiana State University and
Agricultural and Mechanical College
in partial fulfillment of the
requirements for the degree
of Doctor of Philosophy

in

The Department of Management

by

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ABSTRACT

The objective of this experiment is to examine the applicability of American principles of written business communication across cultural boundaries in Mexico. Specifically, four hypotheses were stated for empirical testing using selected groups of Mexican college students:

Hypothesis One: That principles of written business communication emphasized in America create intended images in the minds of Mexican college students. More specifically, these images are produced by business letters, a form of written business communication.

Hypothesis Two: That if accepted principles of written business communication emphasized in America are used in a given message read by Mexican college students, favorable images can be created in their minds.

Hypothesis Three: That if generally accepted principles of written business communication are not used in messages read by Mexican college students, less favorable images will result in their minds.

Hypothesis Four: That American written business communication techniques are appropriate to use in writing to Mexican college students.

To investigate the validity of these hypotheses, an experiment was designed to analyze the semantic reactions of three groups of subjects who had received various message designs according to a planned, systematic procedure.

The rationale for conducting the research was the possibility of extending cross-culturally the generality of American written business communication principles. Because of a lack of basic research on this topic, the present study

should help people of two varying cultural backgrounds to better understand each other and in so doing to improve written business communication.

The experimental design used three groups of student respondents at the Instituto Tecnologico de Monterrey, in Monterrey, Mexico. Five letter messages were translated into Spanish by a panel of experts. One group received messages structured with accepted American principles of written business communication; a second group received message stimuli avoiding such principles; and a third test group received both types of messages for each communication situation. At the conclusion of the experiment, semantic differential tests were employed to measure concept formation. The semantic responses formed the substance of proof or disproof of the hypotheses. In all, the study lasted six class days, and two hundred thirty-seven responses were used to prove the hypotheses.

The experiment's results provided the following conclusions for each hypothesis:

Hypothesis One: When group semantic profiles were plotted on the semantic scales, extremes were quite evident. Thus, it was concluded that message stimuli did appear to create intended images in the Mexican students' minds. Additionally, the image formed seemed to be in direct relation to the type of message received.

Hypothesis Two: Semantic profiles of those groups receiving messages structured with American principles of written business communication confirmed the formation of favorable images in the respondents' minds. Moreover, a greater degree of positive connotation occurred when respondents received good and bad messages alternately.

Hypothesis Three: Semantic profiles of those groups which received messages not structured with American principles of written business communication disclosed negative connotations. However, multiplied negative images were not found when subjects received both good and bad messages alternately.

Hypothesis Four: Since the Mexican students overwhelmingly favored messages structured with American principles of written business communication, there can be little question concerning the desirability of using such principles. Thus, principles such as planned presentation, positive emphasis, conversational tone, adaptation and reader concern do appear to have validity when used in this cross-cultural situation.

Although this experiment extends the validity of certain principles of American written business communication across cultural boundaries, additional research will yield further guidelines for improving written business communication between the United States and other countries and cultures.

Chapter 1

INTRODUCTION

The study of communication is sufficiently complicated if it is confined to the domestic scene. Broadly defined, communication is the essence of human behavior. From a business standpoint, the first executive function is to develop and maintain a system of communication, for administration is communication.¹

When the study of communication is broadened across cultural boundaries, however, the situation soon becomes very complicated. By definition, intercultural communication is the process of the exchange of thoughts and meaning between people of differing cultures. But the road to satisfactory administrative relations with foreigners is obstructed by a series of potential blocks to communication. In sum, these obstacles make up the meaning of "foreignness" as applied to each individual. Behind each man is a vast accumulation of history, environment, and education supporting the cultural attitudes of his society. Because there is a large measure of common experience in the history of mankind, there are fortunately many similarities among cultures. Some, like the

¹Chester I. Barnard, The Functions of the Executive, Harvard University Press, Cambridge, Massachusetts, 1938, pp. 82, 226.

English and others of Anglo-Saxon origin are essentially similar to the United States. But there are also many differences, and it is these which are significant as potential blocks to communication.

Intercultural communication takes place today in practically every sector of human activity. The most important of these would seem to be: (1) Business and Economics, (2) Politics, (3) Science, (4) Art and Culture, (5) Journalism, (6) Tourism, (7) Church and Charity affairs, (8) the Military Sector, and (9) the Personal, Private Sector. As used in this dissertation, the definition of intercultural communication is narrowed considerably as it focuses on written business communication in the form of business letters. Hopefully, the following research will help to improve written business communication between the people of two varying cultural backgrounds.

A. NATURE AND PURPOSE OF THE STUDY

This study is designed to investigate whether or not American written business communication techniques are appropriate to use in a Spanish-speaking culture such as Mexico. There is no shortage of books in the American literature describing "how" to write business letters. Most of them advocate such principles as:

1. Principle of planned presentation--situations involving neutral and good news messages dealt with directly; situations involving persuasive and bad (negative) news dealt with indirectly.

2. Principle of positive emphasis--using words which elicit positive meanings in the reader's mind.
3. Principle of conversational tone and natural expression--replacing worn out expressions, business jargon, rubber stamps, and repetitious phrases by substituting friendlier and more natural language.
4. Principle of adaptation--using language the reader will understand by expressing message units in words paralleling the reader's frame of reference.
5. Principle of reader concern--emphasizing the reader's interest and well being by structuring messages from his point of view.²

Pettit's study examined the empirical validity of these principles as applied in the United States and found that use of them tended to create favorable communicatee connotations, i.e., a favorable company image was created by a company using these accepted principles.³

There has been no research, however, showing whether such American principles would be found valid in other countries and cultures. For example, should an American business man writing to a business man in Mexico emphasize the reader point of view in his letter? It is tempting to believe that because such principles are found effective in American business correspondence that they would be appropriate to use across cultural boundaries. This experiment explores that

²John D. Pettit, Jr., An Analysis of the Effects of Various Message Presentations on Communicatee Responses, doctoral dissertation, Louisiana State University, Baton Rouge, 1969, p. 32.

³Ibid.

issue by focusing on the application of American written business communication principles in Mexico. More specifically, selected groups of monolingual Mexican college students at the Instituto Tecnológico de Monterrey in Monterrey, Mexico were asked to read business letters from two fictitious life insurance companies--one company's letters structured with American principles of written business communication and the other structured without such principles. All business letters used in this classroom experiment were translated from English into Spanish by a panel of three language experts at Southwest Texas State University in San Marcos, Texas. Student reaction to the letters and companies sending them was measured with a semantic differential questionnaire, also translated into Spanish. (See Chapter 2 for complete description of methodology.) The study was designed to replicate Pettit's study, and hopefully the research will yield guidelines for improving business communication between the Mexican and American cultures.

B. STATE OF THE ART OF WRITTEN BUSINESS COMMUNICATION IN THE UNITED STATES AND MEXICO

Evidence of the advanced stage of written business communication in the United States is easily found by looking at the number of textbooks on the subject. A glance at college bulletins and catalogs will also show that in many cases some form of business communication (letter writing, report writing, and/or communication theory) is required to earn a

business degree.

In Mexico, however, there is no equivalent of the American business communication course. A survey of some thirty Mexican universities and commercial schools concerning the possible existence of the course showed clearly that the business writing course per se does not exist in Mexico.⁴ Only one school (Escuela Bancaria Y Commercial in Mexico City) had anything similar--it did offer a correspondence course in business letter writing, but the second half of the course concerned administering an office filing system.

Some commercial colleges in Mexico do offer rather elementary instruction in business letter writing, but again the focus is from a secretarial-office administration point of view.⁵

Lesser, in an examination of the correspondence files of three Panamanian companies, reports consistent overuse of hackneyed and trite expressions.⁶ Examples of common offences are: "receipt of letter of 8th instant," "enclosed please find," "advise delivery date," "attaching herewith," and "Thanking you for the cooperation in this matter, I remain."

⁴The survey was conducted by the author in January, 1974.

⁵See Appendix A for a translated sample of letter writing techniques in Mexico as taught at the Escuela Bancaria y Commercial.

⁶Irvin H. Lesser, "Problems in Business for Spanish-Speaking People," The ABCA Journal of Business Communication, IX, (Summer, 1972), p. 52.

Upon questioning about the use of such expressions, the office managers replied that they had always been used in the past, and "old" correspondence could be cited for proof.⁷

Concerning letter form, Lesser notes:

A two-line inside address is common usage. And apparently very little attention is given to balancing of lines. The first line might extend all the way to the right edge of the envelope, the second line might be extremely short. And where the addressee line begins on the envelope seems to have no pattern.

Almost consistently, the city and date are typed on the same line. This . . . is an approved style for Spanish written correspondence. There seems to be a disregard for spacing among the various parts of the letter. Spacing varies from letter to letter regardless of the length of the letter. Picture framing or reading position are "foreign expressions." The salutation of many, many letters used "Dear Sir" although the first line of the address was a company name or a person's name. The office manager indicated the "Dear Sir" salutation was standard procedure. The tone of almost all letters was "we" oriented. In many cases, the "we" was not only overused but even improperly used. The "we" use seemed to be an obsession.⁸

Although Lesser's work used Panamanian companies, the people of Panama speak and write Spanish, and the remarks should be applicable to Mexico. The inescapable conclusion of this section is that written business communication in Mexico, as a field of endeavor, is still in its infancy.

C. STATEMENT OF THE HYPOTHESES

According to Pettit the motive for using principles of written business communication in a particular letter is

⁷Ibid., p. 53.

⁸Ibid.

that a letter structured by these principles will elicit a probable response from the letter's receiver.⁹ Such responses could range from taking specific action to buy a particular product, to paying an overdue bill--the letter may even cause the reader to feel good about a company or its product. The point is that some image is formed in the reader's mind after reading the message. Thus, a first hypothesis to be tested is:

Hypothesis One: That principles of written business communication emphasized in America create intended images in the minds of Mexican college students. More specifically, these images are produced by business letters, a form of written business communications.

If this general hypothesis can be substantiated, two supplementary hypotheses arise from the major premise.

Hypothesis Two: That if accepted principles of written business communication emphasized in America are used in a given message read by Mexican college students, favorable images can be created in their minds.

Hypothesis Three: That if generally accepted principles of written business communication are not used in messages read by Mexican college students, less favorable images will result in their minds.

In turn, if these two hypotheses can be proved, a fourth and final hypothesis results.

Hypothesis Four: That American written business communication techniques are appropriate to use in writing to Mexican college students.

Proof or disproof of the above four hypotheses should be a significant contribution not only to the American busi-

⁹Pettit, op. cit., p. 3

ness communication discipline, but to international and intercultural business communication as well.

D. IMPORTANCE OF THE STUDY

Within a given culture communication has many complex effects. When communication takes place between two cultures, these effects are even more complex. When written business messages are transported across cultural boundaries, they are encoded in one context and decoded in another. In these intercultural situations there is little of the coorientation that is a prerequisite for communication in general. This greatly increases the possibility of misunderstanding and miscommunication. Thus, intercultural business communication is a testing ground for hypotheses about business communication generally.

This particular study is noteworthy for two reasons: (1) it may extend the generality of principles of written business communication demonstrated by Pettit, and (2) it will help people of two varying cultural backgrounds to better understand the other and in so doing to improve written business communication. If the hypotheses are proved true, then this is a step in extending the generality of American principles to Mexico, and it is at least a beginning in seeing whether American principles of business writing have universal application.

The value of replicating Pettit's study in Mexico must be mentioned here. The experiment uses basically the same pro-

cedure and same materials, except for translations, and retests the hypotheses in Mexico. By holding everything else constant, one can be reasonably sure that whatever differences occur in the findings cannot be attributed to differences in methodology, but rather reflect cross-cultural diversities. If the replication exhibits essentially the same findings, this is evidence that the specific hypotheses have cross-cultural validity.¹⁰ But if the hypotheses are rejected, then American businessmen writing to Mexico may need to use a different strategy--one adapted to the particular culture. This could mean that since Mexican businessmen are more familiar with business jargon, trite expressions, etc., that the use of such phrases would be more effective in communicating with them.

E. LIMITATIONS

In addition to limitations often mentioned about the use of student respondents and the nature of the experimental environment generally, an experiment crossing cultural boundaries develops some unique limitations. Therefore, the following limitations must be acknowledged before interpreting the results of the study.

Although the experiment involves the Mexican culture, there is some difficulty in defining "culture," particularly

¹⁰Godwin C. Chu, "Problems of Cross-Cultural Communication Research," International Communication: Media, Channels, Functions, eds. Heinz-Deitrich Fischer and John C. Merrill (New York: Hastings House Publishers, 1970) p. 470.

in light of the many sub-cultures that make up the overall culture. For purposes of this experiment, "a culture refers to the distinctive way of life of a group of people, their designs for living."¹¹ Observed from close up, relatively small groups of people show signs of their own "culture" which sets them apart from their neighbors; but in such instances it is really better to speak of "sub-cultures." From a broader perspective, these smaller groups seem to amalgamate into a larger cultural group in the usual sense, a group which, despite many inner diversities, nonetheless reveals a unity in basic beliefs and forms of experience--in customs, norms, and behavioral characteristics, and almost always has a common language.¹² Thus the study acknowledges that there is no "pure" Mexican culture and that the results might not be applicable to all of Mexico or Latin America.

Another limitation concerns the problem of contamination of influence. Although the study was made at the Instituto Tecnológico de Monterrey which is in Monterrey, Mexico, some one hundred and fifty miles from the nearest United States border, it is possible that some American influence may have affected the answers given on the semantic differential. The study attempted to at least partially eliminate the prob-

¹¹Clyde Kluckhohn, "The Study of Culture," The Policy Sciences, eds. Daniel Lerner and Harold D. Lasswell (Stanford, California: Stanford University Press, 1951), p. 86.

¹²Gerhard Maletzke, "Intercultural and International Communication," International Communication: Media, Channels, and Functions, eds. Heinz-Dietrich Fischer and John Calhoun, (New York: Hastings House Publishers, 1970), p. 477.

lem by using only mono-lingual Mexican students, i.e., those with a minimum amount of contact with the English language and knowledge of American customs, etc.

Certain demographic factors also raise a limitation. Data was collected from the younger generation, students at the aforementioned school. Thus, it cannot be said with certainty that the study's findings apply equally to all age groups, particularly older Mexicans. Even considering just the "young," answers could vary some extent, e.g., answers given by high school students versus high school graduates versus college graduates. This problem, however, is not unique to this experiment. There is always the problem of how far to generalize the findings.

Another possible limitation involves the translation of the semantic differential, the questionnaire, and the sample letters into Spanish. Some words have no literal translation into another language, and some meaning may be lost. However, an attempt was made to minimize the effects of this problem by using a panel of language experts at Southwest Texas State University for the translations. These experts' translations were further refined for changes in local Mexican dialect by a language expert at the Instituto Tecnologico de Monterrey. A procedure was worked out so that words or expressions not easily translated were eliminated from the experiment.¹³

¹³See Chapter 2--Methodology, for details.

Other limitations, while not particularly significant from a cultural standpoint, must yet be delineated. For example, it is naive to think that students will give the same response as the general public. The advantages of using student respondents in an environment conducive to experimentation, however, outweighs this disadvantage. Also, it cannot be assumed that the results will apply throughout Mexico or Latin America. Additional research will be needed to extend the generalization of the findings.

Another limitation involves the general nature of the experimental environment. Experimental conditions in the classroom are surely not identical to the business world, and student involvement may also be a problem. Every effort was made, however, to create realistic conditions during the experiment.¹⁴

The fact that the selection of the student sample was completed by a non-probability method must be recognized. That is, every student did not have an equal and independent chance of being chosen for the sample. Instead, a convenience sample was used due to the accessibility of the respondents. Thus, an unknown bias might have been introduced. But it is not possible to estimate statistically the chance that other samples would bring different results.¹⁵

¹⁴See Chapter 2--Methodology, for details.

¹⁵Harry L. Hansen, Marketing: Text, Cases and Readings, (Homewood, Illinois: Richard D. Irwin, Inc., 1961) p. 284.

Also, the sample chosen for this study was limited to only one locale and to a limited number of the classes scheduled.

A final limitation concerns concept-scale interaction involving the semantic differential; i.e., there is a possibility that the rating scales may have changed with the concept. Bi-polar adjective scales do not have universal definitions. Thus, the bi-polar adjective "hot-cold" may have different meaning when used in reference to the word water and when used with a star pass receiver. This difficulty can be basically overcome for two reasons: (1) only one concept (company image) is used in the experiment, and (2) since a sufficient number of semantic rating scales are used with that concept, the individual bi-polar adjective contribution to the total variance becomes practically insignificant.

The major limitations of this study limit to an extent the conclusions to be derived from the basic data. Once the limitations are realized, however, the evaluation will be facilitated. Additionally, the limitations offer possible suggestions for future research in intercultural business communications.

F. SIGNIFICANCE OF RELATED STUDIES

Very few studies have attempted to establish empirical validity for "principles" of written business communication emphasized in America. Beyond this, a survey of the business writing literature reveals a lack of testing of

specific principles across cultural boundaries. The purposes of this related studies section, then are: (1) to report on major studies involving empirical research of written business communication principles: (2) to justify use of the semantic differential in cross-cultural behavioral research; and (3) to report on more recent related communications research crossing cultural boundaries.

1. Empirical Investigation of Written Business Communication Principles

A study by Pettit is the foundation for this investigation and represents a major effort to establish an empirical base for validating principles of written business communication.¹⁶ Three groups of students at Louisiana State University were used in the study. One group received business letters structured according to acceptable principles of business communication. The second group received "bad" letters, and the third group received both "good" and "bad" letters. Using the semantic differential, the study found support for the hypothesis that message stimuli (business letters) create communicatee images. Also, messages structured with principles of written business communication produced favorable communicatee connotations, and a greater degree of positive connotation resulted when respondents received both good and bad messages. In turn, those groups receiving business letters not structured with principles of

¹⁶Pettit, op. cit.

business writing displayed negative connotations.

In a related study, Bruno showed that a majority of personality types, especially the friendlier and more sensitive, react favorably to you-viewpoint treatment.¹⁷ The less sensitive and harsh personalities, a minority, are less susceptible to the you-viewpoint. The study thus concluded that a relationship exists between personality traits, personality types (extraversion-introversion) and the perception of written mass communication.

2. Justification for Using the Semantic Differential Across Cultural Boundaries

The use of the semantic differential in cross-cultural research must be justified due to what is often called the "Weltanschauung Problem," the relation between language structure and cognitive processes. A related question asks whether semantic constancy occurs across subjects selected from different cultural and linguistic backgrounds.

To an extent, this interest has been stimulated by the writings of Whorf, who questioned the commonly held notion that the cognitive process of all human beings has a common logical structure (which he called "natural logic") which operates prior to and independent of the particular language used to communicate.¹⁸ Whorf theorized that linguistic

¹⁷Sam J. Bruno, "The Effects of Personality Traits on the Perception of Written Mass Communication," (doctoral dissertation, Louisiana State University, Baton Rouge, 1971.)

¹⁸Benjamin L. Whorf, Language, Thought and Reality: Selected Writings of Benjamin Lee Whorf, (New York: Wiley, 1956.)

patterns, to a large degree, determine how the individual perceives his world and how he thinks about it.

The problem, then, is that of the universality of meaning structure, i.e., the extent to which the components of meaning remain invariant despite variation in language and culture. Typically this problem has been attacked by factor analysis of semantic differential scale scores. For example, Kumata and Schramm, as reported in Osgood, et. al., factor analyzed the scores of bilingual Japanese, Korean, and American students on thirty concepts and twenty scales.¹⁹ They concluded that the language one uses has but little effect on the semantic frame of reference since there were only a few scales which differed in their factor composition as a function of language differences.

Later, Kumata showed the same kind of equivalence for Japanese and American monolinguals, thus extending the generality of the Kumata and Schramm findings.²⁰ A closer look at Kumata's conclusions is warranted:

1. Use of different languages does not produce different semantic structures.
2. Differences in culture do not produce different semantic structures.
3. Use of certain scales does differ as a function of culture.

¹⁹Charles E. Osgood, George J. Suci and Percy H. Tannenbaum, The Measurement of Meaning, (Chicago: University of Illinois Press, 1957), p. 176.

²⁰Hideya Kumata, "A Factor Analytic Study of Semantic Structures," (doctoral dissertation, University of Illinois, 1958.)

4. Meaning of concepts differ as a function of culture.
5. The semantic differential can be utilized in cross-cultural research.
6. Comparability can be obtained in which differences in meanings of concepts can be measured between different culture and language groups.
7. The Sapir-Whorf position of different languages producing different world views is not supported by these findings in the area of dimensions of connotative judgment.²¹

Triandis and Osgood aimed more directly at a test of Whorf's hypothesis and found that Greek and American monolinguals use similar semantic spaces. Another conclusion was that the semantic differential is adaptable in the cross-cultural study of similarities and differences in non-material culture.²² Thus, Triandis and Osgood, as well as Kumata, have produced evidence against the Whorfian hypothesis, at least with respect to meaning as measured by the semantic differential.

A study by Suci extended the comparison of semantic structures to subjects from the American Southwest--Spanish, Hopi, Zuni, and Navaho subjects.²³ With the exception of the Navaho group, a high degree of similarity in the semantic structures of subjects from different cultural backgrounds was

²¹Ibid., p. 258.

²²Harry C. Triandis and Charles E. Osgood, "A Comparative Factorial Analysis of Semantic Structures in Monolingual Greek and American College Students," Journal of Abnormal and Social Psychology, 57, (1958), pp. 187-196.

²³George J. Suci, "A Comparison of Semantic Structures in American Southwest Culture Groups," Journal of Abnormal and Social Psychology, 62, No. 1, (1960), pp. 25-30.

found. Since most subjects were bilingual, the results do not have the generality of those from the Triandis and Osgood or the Kumata studies based on monolingual subjects. The study did show, however, that the main two dimensions of the semantic differential were interpretable as evaluative, and activity-potency or dynamism, the same factors found with all the other culture groups studied.

A major study by Osgood extended further the rejection of the Whorfian hypothesis.²⁴ A study involving some sixteen different countries and languages concluded that there is a universal framework underlying affective or connotative aspects of language. Osgood found clear and convincing confluence of semantically similar scales upon common factors of evaluation, potency, and activity. Also concluded was that the notion and use of "oppositeness" seems to be a common characteristic of languages.

Thus, taking into account the other studies reported in this section, a high degree of similarity may be assumed to exist in the semantic frames of reference used by subjects of different cultural background.

Rosen was not concerned with rejecting the Whorfian hypothesis, but showed that the semantic differential technique may be used in the comparison of attitudes of subjects

²⁴Charles E. Osgood, "Semantic Differential Technique in the Comparative Study of Cultures," American Anthropologist, 66, No. 3 (June, 1964), pp. 171-200.

from different cultural backgrounds.²⁵ Using twenty-seven concepts and twenty scales, Rosen found: (1) real mean differences in attitudes exist between American and Italian students; (2) the semantic differential has validity as a measure of attitudes; and (3) the semantic differential can be translated into a foreign culture without losing this validity. In discussing this technique, Rosen reasons that:

Since the technique has been shown to be reasonably reliable as a cross-cultural measuring instrument and since it measures only connotative aspects of meaning, one can consider cross-cultural differences in semantic differential ratings to constitute an index of attitude differences. Thus, cross-cultural disparity in the connotations associated with the concept "Bible" may be taken as indicative of disparity in attitude toward the Bible.²⁶

A final study using the semantic differential across cultural boundaries is noteworthy. Prothro investigated the basic idea that Arabs are forced to overassert and exaggerate in almost all types of communication if they do not wish to be misunderstood.²⁷ This habitual exaggeration, caused by the structure of the Arabic language, produced cognitive and other effects so that the general behavior of Arabs is characterized by excesses. Stated another way, Prothro hypothe-

²⁵Ephraim Rosen, "A Cross-Cultural Study of Semantic Profiles and Attitude Differences in Italy and the United States," The Journal of Social Psychology, 49, (1959), pp. 137-144.

²⁶Ibid., p. 137.

²⁷E. Terry Prothro, "Arab-American Differences in the Judgment of Written Messages," The Journal of Social Psychology, 42, (1955), pp. 3-11.

sized that statements which seem to Americans to be strongly unfavorable seem to Arabs to be more neutral. Also, statements which Arabs judge to be moderately favorable or unfavorable impress Americans as more extreme.

In the study, two groups of Arab students sorted on an eleven-point scale of favorableness-unfavorableness, general written statements which might be taken as descriptive of any group of people. The judgments of the Arab students were then compared with the previously known judgments of American students. The study concluded that Arab students are more prone to over-assertion than are American students, and that American students are more given to understatement than are Arab students.

An important implication of the study is that Arabs interested in presenting their point of view to Americans should keep in mind that statements which seem to Arabs to be mere statements of fact will seem to Americans to be extreme or even violent assertions. Conversely, those Americans writing to Arabs should note that a statement which seems to be a firm assertion to the Americans may sound weak and even doubtful to the Arabs who read it. If communications are to occur between peoples of different cultures, then attention must be given not only to problems of language codification, but also to problems of culture and cognition.

3. Recent Related Studies Crossing Cultural Boundaries

Peters attempted to determine the extent to which cultural, national and linguistic obstacles impeded informa-

tion flow among a group of international chemists, psychologists and other technologists.²⁸ The critical incident method was used to isolate a specific event. Respondents were instructed to identify the most important information received, the circumstances under which it was acquired, the uses made of the information, and other results. Sociometric analysis and an attitude survey were used to supplement the critical incident method.

The study concluded that cultural and linguistic barriers are not of extremely great importance. The participants strongly rejected any suggestion of national background posing problems to information transfer. Language was ranked high as an obstacle, but language and cultural barriers faded before an apparent need to know and understand. In other words, a need orientation is sufficient to overcome the barriers.

A somewhat related study by Cangelosi, Robinson and Schkade tested the null hypothesis that cultural differences among decision makers made no difference in how information affected decision behavior.²⁹ Thus, a decision maker, regardless of his cultural background would be more likely to make

²⁸E. Bruce Peters, "Cultural and Language Obstacles to Information Transfer," (a paper given at the International Management Division of the Academy of Management Meeting, Boston, Massachusetts, August, 1973.)

²⁹Vincent E. Cangelosi, David M. Robinson and Lawrence L. Schkade, "The Utilization of Information in Rational Choice: A Cross-National Experiment," Social Science Quarterly, (June, 1969), pp. 78-91.

a series of rational choices as the amount of information available to him increases. Subjects from the United States, Mexico, and Finland were put thru a series of binary-choice experiments, being asked to guess which of two symbols--a check or a plus--would be projected on a wall in front of them. Some of the groups were given information on which to base their choices. The study concluded that the subjects who received information (messages) generally behaved more rationally than did those who received no messages. Additionally, Mexican subjects were more strongly influenced by prior responses and used message information to a lesser degree than did Finnish and U. S. subjects. Also concluded was that the three cultural groups may be ranked according to relative rationality as U.S., Finnish, and Mexican subjects.

Ogawa and Welden investigated the effect of feedback in both Japanese-American and Caucasian-American small group discussions.³⁰ Previous research had indicated that feedback could be measured within a process orientation and that Japanese cultural variables could affect the occurrence of feedback. The study found support for the hypothesis that Japanese-American groups demonstrated significantly less feedback behavior than Caucasian-American groups when indexed by teams of coded observers.

A study by Lorimor and Dunn was made to help determine

³⁰Dennis M. Ogawa and Terry A. Welden, "Cross-Cultural Analysis of Feedback Behavior Within Japanese-American and Caucasian-American Small Groups," Journal of Communication, XXII, (June, 1972), pp. 189-195.

the transferability of a successful domestic persuasive or promotional campaign to a different culture.³¹ A conclusion was that persuasive messages are easier to transfer from one culture to another than is generally supposed. There was some support for the hypothesis that a message translated idiomatically is not as effective as one expressing the same viewpoint which is composed from scratch in the language of the intended audience.

McCann investigated the appropriateness of United States management philosophy in a Latin American setting.³² Regarding communication, McCann notes:

In an Anglo-American organization, downward communication is likely to be more direct and frank than upward communication. Nevertheless, directness is desirable in communication traveling in either direction. In Latin America, however, indirectness is frequently necessary because the objectives of the communication are perceived differently. In a democratic society the superior has a duty to tell the subordinate where he stands, what his shortcomings are, and how he can improve himself. The emphasis, actually, is on the future and on the subordinate development--how future activities or functions can be better executed.

In Latin America, basically authoritarian, the superior seeks obedience in his subordinates and shows little concern for their development. . . . The Latin American evaluates the frankness in the criticism in the authoritarian context. . . . He does not perceive the constructive side of the criticism, only the criticism itself. He understands the critique as unilateral dictates and not as one side of a democratic exchange

³¹E. S. Lorimor and Watson Dunn, "Reference Groups, Congruity Theory and Cross-Cultural Persuasion," The Journal of Communication, XVIII, (December, 1968), pp. 354-368.

³²Eugene C. McCann, "Appropriateness of United States Management Philosophy in a Latin American Setting," (doctoral dissertation, Louisiana State University, Baton Rouge, 1963.)

of suggestions and viewpoints. He reacts, therefore, defensively and the open, two-way communication frankness is supposed to elicit is closed off.³³

Finally, a study by Jisr investigated cultural barriers to communication an American businessman might encounter in Lebanon.³⁴ The study generally indicated that cultural differences, comprising the customs and manners of the two people, their speech patterns, their political attitudes, their management practices, and their preconceived ideas of each other can hinder proper communication between them.

In summary, the studies presented in this section show relation to the present research and testify to the diversity of topics that have been investigated across cultural boundaries. None of them, however, have dealt specifically with the transferability of American written business communication techniques to another culture. Hopefully, this experiment incorporating the semantic differential questionnaire will supply some of the answers needed in this field. Such research should help to make business communications a more mature discipline.

G. PREVIEW

Now that preliminary factors such as the nature and purpose of the study, state of the art of written business

³³Ibid., pp. 214-215.

³⁴Aziz T. Jisr, "Cultural Barriers to Communication an American Businessman Might Encounter in Lebanon," (thesis, Louisiana State University, Baton Rouge, 1972.)

communications in Mexico, hypotheses, importance of the study, limitations and significance of related studies have been established, Chapter Two explores in detail the methodology of the experiment. This section discusses the nature and intent of the experimental design, selection of companies and test groups, specific application of the semantic differential including translation into Spanish, design and sequence of letter messages, duration of the experiment, testing procedure and methods of refining the data.

Chapter Three analyzes and interprets data generated from the semantic differential. The statistical data are scrutinized for each of the experimental groups, and comparisons are made between groups.

Finally, Chapter Four reviews the major hypotheses and matches them against the results given in Chapter Three. Too, suggestions are made for further research in written business communications.

Chapter 2

METHODOLOGY OF THE RESEARCH

With the use of the semantic differential in cross-cultural communication research justified in the preceding chapter, this chapter explains the tailor-made experimental design that allows testing of the stated hypotheses. This is accomplished by examining in detail the nature and intent of the experimental design, special problems in the experimental strategy, and methods used for refining the data.

A. NATURE AND INTENT OF THE EXPERIMENTAL DESIGN

One distinguishing characteristic of experimental (laboratory) research is the extent to which the investigator structures the environment in which the research takes place. Thus, in experimental research, an independent variable is manipulated to determine what effect, if any, changes in that variable produce in the variable dependent on it. The experimenter hopes the level(s) of the independent variable will represent what he presumes they represent. If not, conducting these procedures will at least serve to clarify the nature of the independent variable represented by each of the experimental conditions.

In turn, the dependent variable is that which is going to be measured in the experiment. More precisely, the depend-

ent variable is one whose changes are presumed to be consequent on changes in the independent variable. Since experimentation requires a tailor-made design, specifics of the design used and the application of the semantic differential must now be treated.

1. Use of After-Only Pattern

Of the several basic experimental designs existing, the closest to the one used in this experiment is the after-only design. This design permits the effect of an experimental variable to be measured after the factor has been exposed to one or more experimental groups. The experimental variables tested consisted of two groups of various letter messages--one structured with accepted principles of business writing and one structured without the use of such principles. These binary series of messages were directed to three groups of Mexican college students in the following manner:

Group 1--Bad	Group 2--Good	Group 3--Good and Bad Combination
Received messages <u>not</u> structured with principles of business writing	Received messages structured <u>with</u> principles of business writing	Received both good (structured with principles) and bad messages (not structured with principles) for each letter situation

This design allowed investigation of the effect of various message stimuli (the independent variable) on communicatee images (the dependent variable). The effect of certain principles of business communication could be determined by com-

paring responses of subjects in Group 1 and Group 2.¹

Group 3 allowed comparison of the combined effects of good and bad message stimuli; i.e., the interactive effect of reading both good and bad messages could be compared to responses given in Groups 1 and 2.

2. Selection of Companies

According to Thayer four basic elements are required for communication to occur--a sender, a message, a situation, and a receiver.² In this study these elements become:

- (1) the senders--two fictitious life insurance companies,
- (2) the message--various business letters (both good and bad),
- (3) the situation--different business situations in which the company needs to give information or make requests, and
- (4) receivers--monolingual Mexican college students at the Instituto Tecnológico de Monterrey in Monterrey, Mexico.

Fictitious life insurance companies were used to rule out possible previous student exposure with a real company and the resulting bias. But to make the experiment as realistic as possible, the two imaginary companies were named The Atlantic Insurance Company of Mexico, identified with using acceptable principles of written business communication; and The Pacific Insurance Company of Mexico, identified with letters lacking such principles.

¹Pettit, op. cit., p. 21.

²Lee O. Thayer, Administrative Communication (Homewood, Illinois: Richard D. Irwin, Inc., 1965), p. 45.

3. Specific Application of the Semantic Differential

The main reason for using the semantic differential questionnaire in the study was to measure the impressions of various message stimuli, i.e., to see what images were formed in the minds of the Mexican college students after reading letters structured both with and without accepted American business writing principles. Two major steps are involved in constructing a semantic differential: (1) selecting concepts to be measured, and (2) choosing bipolar adjective scales on which concepts are rated.

Selection of concepts. Regarding the first step, English and English have defined the term "concept" as "anything that one can think about that can be distinguished from other 'things'".³ In another sense a concept is an abstraction to which meaning can be attached and is formed by generalization from particulars.⁴ The only concept employed in the study was "company image". This was based on the belief that all business letters have two fundamental goals: (1) a primary objective--to convey information or make a request (the immediate purpose for which the letter is being sent), and (2) a public relations (goodwill) objective--to improve

³H. B. English and A. C. English, A Comprehensive Dictionary of Psychoanalytical Terms, (New York: David McKay, Inc., 1956), p. 104.

⁴Fred N. Kerlinger, Foundations of Behavioral Research (New York: Holt, Rinehart and Winston, Inc., 1964), p. 31.

the company image.⁵ The letters a company writes and sends to the public are part of the company's public relations effort. Thus, company image, as determined by various message designs and as measured by the semantic differential, was the single concept to be rated in the study.

Selection of Scales. After concept determination, the next step in designing a semantic differential is to choose bipolar adjective pairs (scales) on which concepts are rated. According to Kerlinger these adjective pairs are selected after considering relevance to the study and factor representativeness.⁶ Relevance is primarily a judgmental matter, while factor representativeness is more objectively determined. To meet these criteria, the twenty-five scales representing the evaluative dimension of semantic space and chosen from Osgood's Thesaurus Study were examined for possible use.⁷ After applying the relevance criterion to these scales, a list of nineteen potential scales was determined. When the factor representativeness standard was applied, the tally was reduced to the twelve evaluative bipolar adjective scales shown in Table I.

Seven-point rating scales were used since this is the

⁵Raymond V. Lesikar, Business Communication: Theory and Application (Homewood, Illinois: Richard D. Irwin, Inc., 1972), pp. 118-119.

⁶Kerlinger, op. cit., p. 569.

⁷Osgood, Suci and Tannenbaum, op. cit., pp. 53-61.

TABLE I
EVALUATIVE ADJECTIVE SCALES AND FACTOR SCORES OF THE
SEMANTIC DIFFERENTIAL USED IN THE EXPERIMENT

Bipolar Adjectives	Factor Scores From Osgood's Thesaurus Study
1. good-bad	1.00
2. kind-cruel	.52
3. grateful-ungrateful	.49
4. successful-unsuccessful	.51
5. skillful-bungling	.38
6. soothing-aggravating	.37
7. positive-negative	.48
8. reputable-disreputable	.68
9. wise-foolish	.57
10. pleasurable-painful	.37
11. optimistic-pessimistic	.37
12. friendly-unfriendly	.42

interval recommended by Osgood.⁸ The evaluative dimension was emphasized because the experiment involved appraising the images of two life insurance companies. To control for subject response bias, six of the twelve scales were reversed at random. Use of a random numbers table dictated that the following scales be reversed:

<u>Adjective Pair</u>	<u>Number</u>
good-bad	1
kind-cruel	2
grateful-ungrateful	3
positive-negative	7
reputable-disreputable	8
wise-foolish	9

Appendix B contains the complete semantic differen-

⁸Ibid., p. 85.

tials used in the experiment and an adaptation of the standardized instructions recommended by Osgood.⁹

Translation of the Semantic Differential and Message Stimuli into Spanish. To test the stated hypotheses required accurate translation of the semantic differential and message stimuli from English into Spanish. Thus a panel of three bilingual experts in the Spanish and English languages was used to translate the test instrument and various letters into Spanish.¹⁰ If the panel could not agree on a suitable translation for any word, term, phrase, etc., it was dropped from the experiment.

After two of the three panel experts agreed on a particular translation, the entire package of translated material was sent to Dr. Jorge Villegas at the University in Monterrey where minor adjustments in the translations were made due to variations in local dialect. After this review, the translations were returned to the panel of experts in San Marcos who translated the material back into English as a check on its correctness and possible loss of meaning. Final needed adjustments were then made by the panel, and this polished translation from English into Spanish was the one used in the experiment.

⁹Osgood, Suci and Tannenbaum, op. cit., pp. 82-84.

¹⁰The panel members were Dr. Roberto Galvan, Dr. Christopher Stowell and Miss Juanita Hernandez, all faculty members of the Modern Language Department at Southwest Texas State University, San Marcos, Texas.

4. Test Group Selection

The classroom environment provided the necessary control needed to conduct this study and to measure a predetermined experimental variable. Three sections each of introductory marketing and introductory management (both undergraduate courses) at the Instituto Tecnológico de Monterrey were used as test groups in the experiment.

Since there is no business communication course offered there, there was very little possibility of bias entering from students having had the course. To further reduce this possibility, however, students previously taking any courses in business communication were eliminated from the experiment. Also, only monolingual Mexican students were used to reduce bias and coloration of meaning resulting from bilingualness. Table II shows the type of communication each group received, the initial class size and its meeting time.

TABLE II
SIZE, MEETING TIME, AND TYPE OF COMMUNICATION RECEIVED
FOR TEST GROUPS USED IN THE EXPERIMENT

Group	Size	Meeting Time	Type of Communication Received
A	49	3:00 MWF	Good
B	54	4:00 MWF	Good
C	55	10:00 MWF	Bad
D	47	8:00 MWF	Bad
E	46	9:00 MWF	Good and Bad
F	53	10:00 MWF	Good and Bad

Only MWF classes were used since the message sequence demanded

specific day-to-day control. Additionally, an effort was made to keep the three basic groups (good, bad, and combination) equal in size and to balance each marketing section with a management section.¹¹

5. Construction of Message Stimuli

Selected letter messages from Pettit's experiment were translated into Spanish. Basically, two sets of letter messages were used--one group (from Atlantic Company) using accepted principles of business writing as outlined on page 3 and the other group (from Pacific Company) excluding such principles. The message stimuli consisted of five situations representing typical writing circumstances in the insurance industry.¹² Some of the situations assumed that the company initiated the communication, while others assumed the correspondence was initiated by the reader requesting certain information. Descriptions of the letters used, the assumptions of the situation, and the sequence in which the letter messages were presented to the groups are shown below.

Letter 1 -- A good-will building, public relations effort following the customer's first purchase of a \$10,000 whole life insurance policy.

¹¹Pettit, op. cit., p. 30.

¹²Pettit's study used ten messages only because he administered the semantic differential twice--once after the first five letters and once after the tenth. This was done to test the hypotheses that images formed through written messages will change over time as a result of repeated message stimuli.

- Letter 2 -- Explanation of the procedure involved in changing beneficiaries. Assumes a previous request for the letter.
- Letter 3 -- Request for a second premium check after the first one had been misplaced or lost.
- Letter 4 -- Request for payment of a two-week overdue premium.
- Letter 5 -- Refusal of a request for additional insurance coverage. Assumes customer applied for an additional policy but could not qualify because of medical reasons.¹³

The first two letters are neutral or good news messages, letters 3 and 4 are persuasive letters, and letter 5 is a negative or bad news letter. These message stimuli are representative of the basic types of business letters.

The principles of planned presentation, positive emphasis, conversational tone and natural expression, adaptation, and the you-viewpoint, along with the principles of transition, concrete word selection and emphasis were the foundation of message stimuli in The Atlantic Insurance Company of Mexico, whereas these principles were avoided in the letters from The Pacific Insurance Company of Mexico. These messages were the variable (independent) factor in the experimental design. Appendix C contains these dichotomized sets of messages for each of the five writing situations.

6. Duration of the Experiment and Testing Procedure

The study was designed to direct a constant flow of

¹³Pettit, op. cit., pp. 30-31.

message stimuli to the three groups and to measure the groups' impressions with the semantic differential after letter five, the final message in the series. This procedure took a total of six class days, with experimentation beginning August 19, 1974, and ending August 30, 1974. Before the experiment began, a memorandum was sent to the professors of the test groups acquainting them with certain elements of the study (see Appendix D). On the first day of the experiment before the first letter was distributed, instructions concerning the general conduct and duration of the experiment were read to each of the six test groups by the section instructors. (See Appendix E). Next the instructors administered the first letter exposure, and the experiment continued in sequence for the next five consecutive class days.

B. SPECIAL PROBLEMS IN THE EXPERIMENTAL STRATEGY

Prior to the beginning of the experiment several problems were anticipated, which if not dealt with, would cause distortion of the results. This section analyzes those problems, thereby aiding understanding of the overall strategy.

1. Order of Messages in Group 3

One foreseeable problem concerned the order of message presentation in Group 3. If this group, which evaluated both good and bad messages, were to read either the good or bad messages first throughout the experiment, overconditioning and bias could result. To overcome this problem a random

method was used giving each message an equal chance for being presented first in the sequence of exposures.

Specifically, a random numbers table was used with the odd numbers and even numbers of the table associated with good and bad messages, respectively. A sample of five consecutive digits was drawn from the table which corresponded to the five writing situations in the study. To determine the order of message presentation for each exposure, the numbers in the sample of five were examined to see which were odd and which were even. This analysis dictated the following order of presentation for the five message situations in Group 3.

Situation 1--Good, Bad

Situation 2--Bad, Good

Situation 3--Bad, Good

Situation 4--Good, Bad

Situation 5--Bad, Good

2. Subject Involvement

Also anticipated was a problem involving subject identification in the experiment. Because it was feared some students would consider the classroom environment too artificial (thus discouraging mental participation each day), each subject was asked to write a short opinion of the company which sent the letter after reading each message exposure. Subjects were requested to put their names on each evaluation. Although the critiques were collected after each session, no attempt was made to read or analyze them. Rather, the cri-

tiques served the sole purpose of insuring that each subject read each letter and thought about the company each day of the experiment.

3. Class Attendance

Since one objective of the study was to maintain a constant flow of letters to all groups from day to day, an attendance tally was kept for each student throughout the experiment. When a subject missed an exposure, he was required to make it up. Thus, before taking the semantic differential test, each student read and evaluated each intended message exposure.¹⁴ Complete control of message timing was forfeited, however, since some students did not receive all messages on a consistent basis or at the same time that others did.

C. REFINING THE DATA

Once all letter messages and the semantic differential were administered, the data could be coded. This involved punching the information on input cards for a computer program that would furnish statistical measures to aid interpretation of the results. From analyzing the responses to the semantic differential it was found that some of the data were incomplete--thus, the groups were of unequal size. The methods of coding and equalizing the test groups are detailed next. Such discussion, concluding the analysis of research

¹⁴Pettit, op. cit., p. 36.

methodology, serves as a prelude to specific interpretation of the statistical results.

1. Coding the Data

The semantic impressions for all test groups were assembled, and each subject profile was numbered in sequence to identify the respondent and the group he represented. Student responses on the semantic differential were quantified and transferred to input cards for a computer program. This was accomplished by using a seven-point range corresponding to the columns between the bipolar scales from left to right.

2. Equating the Test Groups

Because some students dropped the course being used as a test group and due to absences on the day the semantic differential was administered, some of the data were incomplete. This problem was compounded since statistical techniques for the semantic differential required that each group be identical in size--thus, additional data review was dictated.

Each of the three test groups was inspected to find the least number of usable responses. Group 1 had 79 retainable tests, Group 2 had 85, and Group 3 had 91. Since the least number of available tests in any group was 79, the responses from the other two groups were reduced to this number by eliminating six tests in Group 2 and twelve from Group 3. Such deletions were accomplished randomly by drawing individual

samples of six and twelve from a random numbers table, and tests corresponding to these numbers in the two groups were eliminated. Thus each group was balanced at 79 tests (237 in total) so the computer program could statistically manipulate the data.

D. SUMMARY

This chapter has presented the complete methodology and research design for the classroom experiment to test the validity of specified written business communication principles across cultural boundaries in Mexico. By using an adaptation of the after-only experimental design and the semantic differential, an independent variable (various letter messages) was used to determine what effect, if any, changes in that variable produced in the dependent variable (communi-
catee images).

Five letter messages for each of two fictitious life insurance companies from Pettit's experiment were translated into Spanish by a panel of experts. Three groups of Mexican college students read these letter messages as follows: one group read messages from Atlantic Company structured according to accepted principles of written business communication, the second group received messages from Pacific Company disregarding these principles, and the third group read both good and bad letter messages for each communication situation. After the last message exposure (on the sixth class day), a semantic differential was given to measure student's images

of the companies sending the letters.

Special problems involved the order of messages in Group 3, subject involvement and class attendance. Concerning the first, a random method was used to insure that subjects in Group 3 had an equal chance of reading either a good or bad letter message first. Student involvement was maintained by getting each respondent to write a short critique of the company sending a particular message unit. The attendance problem was minimized by keeping an attendance tally for each student throughout the experiment. All missed exposures were made up prior to administering the semantic differential.

Once the data were collected, responses to the semantic differential were coded and key punched for a computer program. Then the test groups were equated and reduced to a final size of 79. With the data in workable form, attention is now devoted to an interpretation of the experimental results.

Chapter 3

AN ANALYSIS OF THE EXPERIMENTAL RESULTS

The primary objective of this chapter is to relate the experimental results to the hypotheses of the study. Briefly restated, these hypotheses are: (1) that principles of written business communication form images in the minds of Mexican college students, (2) that "good" communications create favorable communicatee images, (3) that "bad" communications cause unfavorable communicatee images, and (4) that American written business communication techniques are appropriate to use in writing to Mexican college students. The mass of data generated by the semantic differential questionnaire is meaningful only as it relates to these hypotheses.

To evaluate the data within the framework of the hypotheses, a three-stage plan is used. First, scale variance is analyzed to determine which adjective pairs were most effective in distinguishing concepts of the experiment. Second, to provide the substance of the test of proof or disproof of the hypotheses, analysis of semantic profiles and interspace concept distance is employed. Finally, "t" values are analyzed to determine the degree of statistical significance associated with the experimental results. These three analytical strategies, when viewed as a whole, should firmly prove or disprove the hypotheses of the experiment.

A. DISPERSION OF THE SEMANTIC RESPONSES

An examination of the dispersion of the semantic responses will disclose whether the twelve bipolar adjective pairs were effective in differentiating the meaning of concepts rated in the study. Such examination will also expose any adjective pairs that may need to be eliminated from further statistical analysis. Small variance scores imply that respondents exhibited homogeneous feelings about the concepts, whereas large variances indicate heterogeneous feelings. The only bipolar adjective scales used to prove or disprove the hypotheses will be those exhibiting congruous meaning in all three test groups.

Table III gives the results of a frequency distribution of variances for each semantic scale in all groups. An inspection of the variance scores found in Table VI, Appendix F, will show that the cell divisions used in the distribution were appropriate. Table III shows that some adjective scales exhibited wider response dissemination than others. Specifically, adjective scale 4, "successful-unsuccessful," displayed excessive variation as all of the response variance occurred outside the first cell interval (137.5 and below). Since respondents inconsistently rated concepts on this particular scale, it was eliminated from further statistical manipulation. The remaining eleven scales all had at least half of the variation accounted for by the first cell interval, and scales 1, 2, 9, 10, and 12 had all variation accounted for by this interval. This indicates extremely con-

TABLE III
DISTRIBUTION OF RESPONSE VARIANCES BY INTERVALS FOR ALL GROUPS

Semantic	137.5 and below	137.5-162.5	162.5-187.5	187.5-212.5	212.5-237.5	237.5-262.5
1	4					
2	4					
3	3				1	
4		1	2			1
5	2		2			
6	2	1		1		
7	3	1				
8	3	1				
9	4					
10	4					
11	2	1		1		
12	4					

Source: Table VI, Appendix F

gruous sentiments relative to these five scales. At any rate, the eleven scales retained insured consistent statistical results and accurate measurement of the respondents' impressions.

B. GROUP PROFILES AND INTERSPACE CONCEPT DISTANCE

Another useful measure beneficial for concept comparison among groups is obtained by plotting mean values for each of the eleven semantic scales and connecting them together to form semantic profiles. Such graphic comparisons aid in proof or disproof of the hypotheses. Additionally, semantic space distances between concepts and groups are measured quantitatively by the D statistic to supplement the profile analyses.

1. Group Concept Structure

The computer program provided mean values, by adjective scales, for all three test groups. These values, found in Table VII, Appendix G, are the basis for the following analysis of profile graphics.

Figure 1 results from the careful plotting and collective joining of mean values for all test groups. If the first three hypotheses were untrue, the result would be profiles superimposed in a straight, vertical line at the middle position of each adjective scale. Such profiles would imply that the respondents formed no mental image of the companies after receiving different message stimuli. Figure 1 clearly reveals that this meaningless situation does not exist.

In fact, the profiles show that the groups declared diverse images of the two companies involved. The most dramatically favorable image was that of Atlantic Company in Group 3 (the group rating both good and bad messages). Of particular importance is the high score Atlantic received for being so "friendly." On all eleven adjective scales, however, respondents in this group viewed this company with the highest degree of approving connotation.

While respondents in Group 2 also perceived Atlantic Company in a favorable manner, the graphic profile is not as extreme as that of Atlantic Company in Group 3. Thus, the more extreme, positive scores occurred when respondents received and compared message stimuli of both companies. This suggests that subjects in both Atlantic groups were able to recognize "good" written business communications when exposed to them, but that when both "good" and "bad" messages were evaluated by the same group, Group 3, then the positive rating was more extreme. Dimensionally, there was little difference between the two Atlantic groups in the mean values for "skillful," "reputable," "wise," and "optimistic." Greater mean differences occurred, however, on the "good-bad," "kind-cruel," "grateful-ungrateful," "soothing-aggravating," and "positive-negative" adjective scales. Once again, the most extreme score for Group 2 was on the scale "friendly-unfriendly." On this scale, the subjects viewed the company as friendly (but not to the extreme as did the Atlantic subjects in Group 3).

Although images of Pacific Company in Groups 1 and 3 parallel each other closely, the most adverse profile relates to Pacific Company in Group 3. Inspection of Figure 1 reveals that this profile penetrates and extends farther on more extremely unfavorable scale positions than those of any other group. Deserving mention is the fact that respondents in this group view Pacific as only "slightly disreputable" but quite "unfriendly." Overall, subjects in Pacific Company, Group 3 rated the company as evaluatively more sinister with a high degree of disapproving connotation.

Respondents in Group 1 rated Pacific with a similar disapproving connotation, but just slightly less extreme. On just one scale, "skillful-bungling," did respondents in Group 1 have a slightly higher (more extreme) mean score than did the corresponding subjects in Group 3. Thus, the extreme connotations occurred once again where subjects were able to evaluate both good and bad written business communication. There was no question in either group, however, as to what constituted a "bad" letter.

Upon considering the overall semantic results, some trends, similarities and differences become apparent. First, the most approving and disapproving profiles come from Group 3 in their rating of Atlantic and Pacific Company. Between these extreme ratings are found the images of Atlantic Company and Pacific Company formed in Groups 1 and 2, respectively. Also, there is a greater profile difference between the images of Atlantic Company in Groups 2 and 3 when compared

to profile difference of Pacific Company in Groups 1 and 3. Thus, message interaction in group 3 appears to create multiplied judgments regarding what is considered "good," but not to what is rated "bad." Overall, however, it can be concluded that profiles of Atlantic Company rated connotatively good, while profiles of Pacific Company rated connotatively bad.¹

2. D Statistic Reinforcement

Associated with visual profile analysis in semantic differentiation is another useful analytical measure, the D statistic.² If two concepts are close together in semantic space, they are alike in connotative meaning for the group making the judgments, and the resulting D score would be relatively small. Conversely, if two concepts are separated in semantic space, they differ in meaning, and the D statistic would be numerically larger. While such quantitative values do not indicate the intensity or direction of a connotative judgment, they are useful in reinforcing the semantic profile

¹Pettit arrived at the same basic conclusions in his study relative to the evaluative portion of the semantic differential.

²D statistics used in this experiment were computed in the following manner:

$$D = \sqrt{\sum d^2}, \text{ where } D = \text{linear distance between two concepts, and}$$

$\sum d^2$ the subtraction, square, and summation of all mean scale responses between two given semantic differentials.

For specifics of D statistic calculation, see Osgood, et. al., The Measurement of Meaning, pp. 89-97.

analysis.

Such reinforcement is evident from an inspection of Table IV. The largest linear separation ($D = 13.48$) between

TABLE IV
D STATISTIC MATRIX SHOWING LINEAR
DISTANCES BETWEEN CONCEPTS

	1	2	3	4
1	0.00	11.26	12.66	.97
2		0.00	2.47	10.45
3			0.00	13.48
4				0.00

Key

- 1 Pacific Company (Group 1)
- 2 Atlantic Company (Group 2)
- 3 Atlantic Company (Group 3)
- 4 Pacific Company (Group 3)

concepts concerned the relationship of the two companies in Group 3, which rated both good and bad messages. Thus, the connotative images of Atlantic Company and Pacific Company in this group were the most widely separated of any combination of groups in the study. Such wide numerical divergence is completely consistent with the visual separation provided by the profile analysis. Likewise, the most convergent images ($D = .97$) pertained to concepts of Pacific Company, Group 3 and Pacific Company, Group 1. These extreme measures of semantic spacial separation are followed by D statistics of 12.66 (Pacific Company, Group 1 and Atlantic Company, Group 3); 11.26 (Pacific Company, Group 1 and Atlantic Company, Group 2); 10.45 (Pacific Company, Group 4 and Atlantic Company, Group 2); and 2.47 (Atlantic Company, Group 2 and Atlantic

Company, Group 3). Just as the foregoing D scores are between the extreme D's of .97 and 13.48, so too are the visual profiles of the corresponding groups between the extreme profiles of Pacific Company, Group 3 and Atlantic Company, Group 3. Thus, D statistics appear to reinforce the preceding profile analysis.

C. RELIABILITY OF THE SEMANTIC DATA

Profile analysis and use of D statistics have suggested that the experiment's four hypotheses are correct, but the analysis is not complete until statistical significance of the data is examined. To accomplish this, the following sections report on the nature and use of the "t" test, the judgment standard used to determine the statistical significance of the results, and the interpretation of specific "t" tests.

1. T Scores as a Measure of Statistical Significance and the Judgment Standard

As a widely accepted statistical measure, the "t" test is used to verify the statistical significance between mean values when the sample size is small and the σ (standard deviation of a population) is not known.³ It is particularly valuable to this research since it is important to know whether differences in mean scores between two sets of semantic

³Samuel B. Richmond, Statistical Analysis, 2nd ed., (New York: The Ronald Press Company, 1964), pp. 184-195.

data occurred by chance or were caused by some factor other than random variation.

In designing the "t" test, a null hypothesis was stated that there would be no difference between the mean values on any two semantic scales; thus, the population mean of one group (μ_1) would equal that of another (μ_2). "T" values for all possible combinations of scale means between profiles were computed to test the hypothesis ($\mu_1 = \mu_2$).⁴

After calculation of the "t" statistics, the values were compared to critical "t" scores associated with predetermined significance levels. Specifically, critical "t's" for both the $\alpha = .05$ and $\alpha = .01$ levels of significance were used, and "t" scores from the experiment were compared to both levels for statistical reliability. Then judgment standards were established to determine the number of adjective scales needed to infer that a significant difference existed between two profiles. Formally stated, these standards were:

If one of the eleven scales was significant at the $\alpha = .05$ level, (the individual "t" value was greater than the critical "t" at $\alpha = .05$), the entire profile was considered significant.

If one of the eleven scales was significant at the $\alpha = .01$ level, (the individual "t" value was greater than the critical "t" at $\alpha = .01$), the entire profile was considered significant.

To understand the reasoning underlying the standards, consider that, at $\alpha = .05$, researchers would expect 5 out of

⁴"T" values were determined according to the "paired samples" method given in Croxtan and Cowden, Practical Business Statistics, pp. 377-357.

100 scales to show "t" scores higher than the critical "t" on the basis of random variation. At $\alpha = .01$, researchers would expect 1 out of 100 scales to show significance for the same reason. Thus, if more scales fall above the critical points, it can be inferred that some factor other than random variation caused such a happening.

In this study, only eleven semantic scales were used to rate the various concepts, so the minimum number of scales to indicate statistical significance had to be determined. If 1 scale out of 11 were significant, this would represent 9.09 per cent of the whole. Using 100 as a base, this would mean that nine scales would have greater "t" scores than the critical value, a number greater than that which should occur due to chance at $\alpha = .05$. Likewise, at $\alpha = .01$, a smaller number of scales would be needed to show significance, but it would be both meaningless and impossible to divide any one scale into fractional units. So, if 1 scale out of 11 shows significance at either the $\alpha = .05$ or $\alpha = .01$ levels, the null hypothesis is disallowed, and the two profiles become significant in their entirety. The foregoing reasoning concerning statistical significance is consistent with Osgood's thoughts on the subject since he states that if at least one dimension in a semantic test is significant, then the entire test is significant.⁵

⁵Osgood, et al., op. cit., p. 100.

2. Analysis of Significant Differences

Tests of significance were applied to all concept relationships in the study. The three groups taken two at a time yielded a total of six possible group relationships. Table V shows the number of scales in each semantic test with "t" values outside the critical "t" scores for all six combinations.

TABLE V

NUMBER OF ADJECTIVE SCALES FALLING OUTSIDE CRITICAL "T"
VALUES CORRESPONDING TO VARIOUS CONCEPT
RELATIONSHIPS WITHIN THE EXPERIMENT

Relationship	Number of Scales Falling Outside of Critical "t" Value at $\alpha = .05$	Number of Scales Falling Outside of Critical "t" Value at $\alpha = .01$
Group 3 (Atlantic) Group 3 (Pacific)	10	10
Group 1, Group 2	10	10
Group 3 (Atlantic) Group 2	11	11
Group 3 (Pacific) Group 1	10	10
Group 3 (Pacific) Group 2	10	9
Group 3 (Atlantic) Group 1	10	10

Source: Tables VIII - XIII, Appendix H

Upon applying the judgment standard, all six relationships ranked statistically significant. Thus, the "t" tests

indicate that the concepts structured in the experiment did not occur by chance.

Chapter 4

SUMMARY AND CONCLUSIONS

The purpose of this experimental research was to examine the application of American written business communication across cultural boundaries in Mexico. Specifically, by replicating Pettit's study, the interrelationship of communicatee reactions to various message designs was examined with the objective of validating selected principles of American written business communication for use in communicating with Mexican college students. Such goals required the statement of the following four hypotheses for testing.

Hypothesis One: That principles of written business communication emphasized in America create intended images in the minds of Mexican college students. More specifically, these images are produced by business letters, a form of written business communication.

Hypothesis Two: That if accepted principles of written business communication emphasized in America are used in a given message read by Mexican college students, favorable images can be created in their minds.

Hypothesis Three: That if generally accepted principles of written business communication are not used in messages read by Mexican college students, less favorable images will result in their minds.

Hypothesis Four: That American written business communication techniques are appropriate to use in writing to Mexican college students.

Although Pettit empirically verified the effectiveness of such principles for use in American written business communications, the applicability of these techniques had never

been examined across cultural boundaries. Proof or disproof of the four stated hypotheses seemed to offer a genuine contribution to the business communication discipline as it could be an important step in extending the generality of American principles to Mexico. Beyond that, the experiment was a beginning in determining whether American written business communication principles have universal application.

To investigate the use of accepted American principles in a cross-cultural setting, Pettit's experimental design was replicated with specified modifications. Three groups of subjects at the Instituto Tecnológico de Monterrey in Monterrey, Mexico, were selected, and two different series of letter messages were chosen from Pettit's experiment and translated into Spanish by a panel of language experts. These messages were read and evaluated by the Mexican college students in varying fashion. One experimental group read only messages (from Atlantic Company) structured with principles of American written business communication; another group read messages (from Pacific Company) designed to avoid the use of such principles; and the third test group read both types of messages (from both companies) for each letter situation throughout the study period.

After the fifth message exposure, the semantic differential was administered to measure images created in each group by the message stimuli. These images were carefully examined, and intergroup and intragroup comparisons were made using the framework established by the four hypotheses. A

reiteration of conclusions evolving from the analysis follows.

A. HYPOTHESIS ONE

Hypothesis One was stated to determine whether written business messages caused image formation among Mexican college student respondents. Lack of image formation would suggest that there is no reason for preferring one written message over another (both dealing with the same problem) in communicating with Mexican students in an intercultural situation. Phrased differently, if no images were formed, the entire field of American written business communication would be of questionable value as it relates to the intercultural situation of communicating with Mexican college students.

That communicatee images were formed was apparent from examination of the group profiles (see Figure 1, Chapter 3). When such images were plotted graphically, extremes were quite evident, and the image formed seemed to be in direct relation to the type of message received. Such a conclusion, while lending great support to Hypothesis One, leads into Hypothesis Two.

B. HYPOTHESIS TWO

As an extension of the first hypothesis, Hypothesis Two was stated to determine whether messages structured with accepted principles of American written business communication elicited favorable images from the Mexican respondents. An analysis of the semantic profiles of those groups receiving

"good" messages confirmed this hypothesis, as the subjects rated both Atlantic groups with a high degree of approving connotation. Noteworthy, however, was the "multiplier effect" that occurred when respondents were exposed to good and bad messages alternately. Evidenced by a greater dispersion of favorable connotations in Group 3, the multiplier effect was only noted in the formation of favorable images.

C. HYPOTHESIS THREE

The purpose of Hypothesis Three was to measure the images formed by the Mexican respondents when message stimuli were structured without the use of American written business communication principles. This hypothesis was also confirmed, as negative connotations resulted; however, due to the absence of the multiplier previously mentioned, there was less discrepancy in the images created in the two Pacific groups. The most unfavorable connotations occurred in Group 3 (which rated both good and bad messages), but, as just alluded to, the images formed in Group 1 were only slightly less extreme.

D. HYPOTHESIS FOUR

Hypothesis Four was stated as a natural outcome of the first three hypotheses and was proposed to extend the generality of American written business communication to communicate more effectively with Mexican college students. Since the Mexican students overwhelmingly favored messages structured with American principles, there can be little ques-

tion concerning the desirability of using such principles. Thus, principles such as planned presentation, positive emphasis, conversational tone and natural expressions, adaptation, and reader concern do appear to have validity when used in this intercultural situation.

E. IMPLICATIONS FOR FURTHER RESEARCH

While this pioneer experiment verified the effectiveness of American written business communication principles in communicating with Mexican college students, it is admittedly limited in scope. For example, it cannot be said that on the basis of this research that the American principles would be valid in communicating with other Mexicans such as engineers or those belonging to older age groups. Results could also differ based on other demographic factors such as income level, amount of education, or occupation. Nor can the findings be generalized to the point of inferring applicability throughout all of Mexico or other Latin American or South American countries where Spanish is the principal language. Further research is needed to give additional insight in these areas.

Encouraging, though, is that previous research (reviewed in Chapter One) provides evidence for a universal framework underlying certain affective or connotative aspects of meaning. These findings enliven the possibility of constructing instruments for measuring these aspects of "subjective culture" comparably in diverse societies--in effect,

circumventing the language barrier.

The strategy of cross-cultural communication research is primarily one of hypothesis testing and exploratory theory building. The former provides an additional test of a previously corroborated hypothesis in a different culture. For example, a future researcher might want to know whether the findings about one-sided versus two-sided communications¹ apply to the Mexican culture. Cross-cultural confirmation of the original hypothesis will widen the scope of its generality.

But if the researcher fails to replicate the original findings in another culture, he would want to know what cultural factors are responsible for this failure. So, in addition to testing the original hypothesis, it will often be desirable to investigate additional propositions concerning important cultural variables. For instance, it may be argued that in a culture which stresses authoritarian submission, people will be overly dependent and have a high need for cognitive clarity. Thus, a written (or oral) persuasive communication presenting a clear-cut one-sided argument will likely be accepted, while a two-sided argument may cause confusion and doubt. It can then be hypothesized that in this type of culture, one-sided communications will be consistently more effective than two-sided communications.

Future researchers should consider that international communication in general takes place not between two countries

¹C. I. Hovland, I. L. Janis, and H. H. Kelley, Communication and Persuasion (New Haven, Connecticut: Yale University Press, 1953).

in toto, but rather between single individuals or groups of two cultures. Thus, intercultural communication does not come about haphazardly, but takes place between communication partners who share several things in common; i.e., similar educational levels, common interests, a common profession, etc. For example, intercultural communication would likely take place between American businessmen and their counterparts (other businessmen and customers) in Mexico.

Because of this distinct probability, a kind of horizontal field of communication develops that can be described as "intercultures" or "third cultures." These common interests can very often be stronger and more binding than other loyalties that have built up within the culture itself. Thus, an American businessman might feel more at home with a fellow Mexican businessman than with an American farm laborer. But as yet, there has been very little research about the extent, structure, or dynamics of these "intercultures" which extend beyond the grounds of a given culture. Future research could provide answers to questions such as: in written correspondence between an American and Mexican businessman, could the semantic differential be used to measure the effects of specific principles of written business communication or individual letter types; and, could the semantic differential technique be employed in research areas of intercultural business report writing?

The need for further testing and research concerning American principles of written business communication is

evident. In this era of increased emphasis on intercultural and international communication, such research will hopefully yield further guidelines for improving business communication between the United States and other countries and cultures. Too, continued intercultural research in this area will result in a more mature business and organizational communication discipline.

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APPENDIX A

Sample Translations From
Practicas Comerciales Y Documentacion
by Ignacio Carrillo Zalce

Sample Translations From Practicas Comerciales

Y Documentacion

by Ignacio Carrillo Zalce

1. All business letters consist of the following: (p. 137)
 - A. Place and date it is written--the city, state and sometimes the country is written by the date. It is not correct to abbreviate the month
 - B. Name and address of person receiving the letter
 - C. Salutation
 - D. Text
 - E. Complimentary close
 - F. Signature
 - G. References to initials, enclosures, copies
2. There is no excuse for misspelling proper names. The salutation depends upon familiarity with the person who one is writing to. It is customary to use the "reference line." If the "reference" line is used, the letter is to begin directly with the business; otherwise, it can refer to previous communication. Modern tendencies are to refer to previous correspondence not by its date, but by the subject of the business. When writing to someone for the first time the beginning paragraph should try to capture the person's attention so that he will read the whole letter. (pp. 140-147)
3. A letter should have: (p. 148)
 - A. Good grammar--don't begin a paragraph with a gerund. Use short sentences and avoid repetition by using synonyms.
 - B. Courtesy--avoid saying unpleasant things or that suggest unpleasant thoughts.
 - C. Clarity--put yourself in the shoes of the receiver of the letter to see if it is clear.
 - D. Conciseness--avoid unnecessary words.
 - E. Unity of purpose--ask yourself why you are writing before beginning the letter.

4. The organizational plan of a letter: (p. 150)

- A. List the things you desire to talk about in the letter.
- B. Write a paragraph for each of the things you want to talk about. Forget you are writing a letter and say things as you would in a conversation. (Emphasis added.) Write it in draft form without worrying about spelling or punctuation. Let the ideas flow naturally. End the paragraph when you feel you have said everything you need to say about the subject.
- C. Revise
- D. Forget about the letter for a while (1 hour is sufficient.)
- E. Revise, looking out for punctuation, conciseness and clarity.
- F. Dictate or write the letter in final form.

5. The last paragraph, depending on the type of letter, should summarize, courteously insist on the subject, or have the receiver take some action. (p. 152)

For the concluding phrase (complimentary close), it is now more personal--avoiding the old style phrases such as "somos sus atentos, afectisimos", translated--"we are your attentive, affectionate and faithful servants."

6. Some types of letters: (p. 157)

- A. Acknowledging receipt (of anything)
- B. Acknowledging orders
- C. Remitting
- D. Introduction
- E. Recommendation
- F. Requesting information

7. Letters acknowledging receipt of enclosures: (p. 157)

- A. Refer to the letter accompanying the enclosures.
- B. Acknowledge receipt of enclosure by describing it adequately.

- C. Indicate what is to be done with the enclosure, especially if it is a check.
 - D. Give thanks for the remittance of the enclosure.
8. Letters acknowledging orders: (p. 159)
- A. Let the client know the order has been received and give him an opportunity to clarify, if necessary any part of the order.
 - B. Cordially thank the client for the purchase.
 - C. Assure delivery and mention terms of shipment.
 - D. If appropriate offer the services of the sales or service department.
 - E. Close the letter by giving thanks and expressing a desire to be of continuing service.
9. Letters remitting (anything but merchandise): (p. 162)
- A. Mention what is being sent and whether it accompanies the letter or not.
 - B. Clearly describe what is being sent, the reason for it and if proper, its use and destination.
 - D. If proper, request acknowledgment of receipt of enclosures or remittance, and the letter is closed in a friendly and courteous manner.
10. Letters of introduction: (p. 162)
- A. Include a brief paragraph greeting the person receiving the letter.
 - B. Give the introduction of the person, stating his name and specific information about him.
 - C. Give the reason for the introduction.
 - D. End with a paragraph thanking the reader for the consideration given the letter and the person introduced.
11. Letters of recommendation: (p. 162)
- A. Give the name of the person, including, if necessary a means of identification.
 - B. State the basis for the recommendation--the time you have known the person and circumstances of acquaint-

ance, and what exactly is the recommendation.

- C. Give thanks for consideration given the letter.
(These letters should be written only when the personal qualities stated therein are true.)

12. Letters requesting information: (p. 162) They are of two types--one requesting information in general and the other requesting information about a person. Those requesting personal information either for employment or to extend credit are usually form letters so that important data will not be overlooked. Letters requesting information in general would:

- A. State the reason for the request and explain how the information will be used.
- B. Indicate precisely the information desired.
- C. Indicate that the person was chosen to be asked for the information without exaggerating or flattering.
- D. End the letter giving thanks for the consideration shown to it.

APPENDIX B

Instructions and Format of the Semantic Differentials Used in the Experiment

(English version followed by Spanish equivalent)

Instructions

The purpose of this test is to measure the meanings of certain facets of the study in which you have been participating. On the following page you will find a certain area of the study you are to judge and beneath it a set of descriptive scales. You are to rate the concept on each of these scales in order.

1. If you feel that the concept at the top of the page is very closely related to one end of the scale, you should place an "X" as follows:

	Very	Close-	Slight-	Neu-	Slight-	Close-	Very	
		ly	ly	tral	ly	ly		
FAIR	X	:	:	:	:	:	:	UNFAIR

or

FAIR	:	:	:	:	:	:	:	X	UNFAIR
------	---	---	---	---	---	---	---	---	--------

2. If you feel that the concept is quite closely related to one or the other end of the scale (but not extremely), you should place an "X" as follows:

	Very	Close-	Slight-	Neu-	Slight-	Close-	Very	
		ly	ly	tral	ly	ly		
STRONG	:	X	:	:	:	:	:	WEAK

or

STRONG	:	:	:	:	:	:	X	:	WEAK
--------	---	---	---	---	---	---	---	---	------

3. If the concept seems only slightly related to one side as opposed to the other side (but is not really neutral), then you should check as follows:

	Very	Close-	Slight-	Neu-	Slight-	Close-	Very	
		ly	ly	tral	ly	ly		
ACTIVE	:	:	X	:	:	:	:	PASSIVE

or

ACTIVE	:	:	:	:	X	:	:	PASSIVE
--------	---	---	---	---	---	---	---	---------

The direction toward which you check, of course, depends upon which of the two ends of the scale seem most characteristic of the area you're judging. (Note that each column is labeled for your convenience.)

4. If you consider the concept to be neutral on the scale, or if the scale is completely irrelevant to the concept, then you should place your "X" in the middle space.

Very Close- Slight- Neu- Slight-Close- Very
 ly ly ly tral ly ly
 SAFE _____:_____X_____DANGEROUS

IMPORTANT

1. Place your X's in the middle of the spaces, not on the boundaries:

 This Not This
 _____:_____X_____X_____

2. Be sure you check every scale--do not omit any.

3. Never put more than one "X" on a single scale.

Please do not look back and forth through the items or try to remember how you checked similar items earlier in the test. Make each item a separate and independent judgment and work at a fairly high speed through the test. You do not have to worry or puzzle over individual items. Your first impressions are the ones that are important. On the other hand, please mark your judgments carefully so that the results will give your true impressions.

Instrucciones

El propósito de este examen es medir el significado de ciertas facetas del estudio en que usted ha estado participando. En la siguiente hoja encontrará parte del estudio que va a juzgar, y siguiéndolo una serie de escalas descriptivas. Debe valorar el concepto en cada una de estas escalas en orden.

1. Si piensa que el concepto al principio de la hoja está muy relacionado con un extremo de la escala, debe colocar la "X" como sigue:

	Muy	Estre-	Ligera-	Neu-	Ligera-	Estre-	Muy	
		cha-	mente	tral	mente	cha-		
		mente				mente		
JUSTO	X	:	:	:	:	:	:	INJUSTO

o

JUSTO	:	:	:	:	:	:	X	INJUSTO
-------	---	---	---	---	---	---	---	---------

2. Si piensa que el concepto está bastante relacionado con uno u otro extremo de la escala (pero no estremadamente) debe colocar la "X" como sigue:

	Muy	Estre-	Ligera-	Neu-	Ligera-	Estre-	Muy	
		cha-	mente	tral	mente	cha-		
		mente				mente		
FUERTE	:	X	:	:	:	:	:	DEBIL

o

FUERTE	:	:	:	:	:	X	:	DEBIL
--------	---	---	---	---	---	---	---	-------

3. Si el concepto parece estar ligeramente relacionado con uno u otro lado opuesto (pero no realmente neutral), entonces debe marcar como sigue:

	Muy	Estre-	Ligera-	Neu-	Ligera-	Estre-	Muy	
		cha-	mente	tral	mente	cha-		
		mente				mente		
ACTIVO	:	:	X	:	:	:	:	PASIVO

o

ACTIVO	:	:	:	:	X	:	:	PASIVO
--------	---	---	---	---	---	---	---	--------

La dirección en que usted marque, por supuesto, depende en cual de los dos puntos de la escala parece ser mas característica del área que está calificando. (Tome nota de que cada columna está clasificada para su conveniencia.)

4. Si usted considera el concepto neutral en la escala, o si la escala es completamente inaplicable al concepto, entonces debe colocar la "X" en el espacio de en medio.

Muy	Estre-	Ligera-	Neu-	Ligera-	Estre-	Muy
	cha-	mente	tral	mente	cha-	
	mente				mente	

SEGURO _____:_____X_____PELIGROSO

IMPORTANTE

1. Ponga su "X" en medio del espacio, no en las orillas:

	Así	No Así
_____	:_____X_____	:_____X_____

2. Tenga cuidado de marcar cada escala, sin omitir ninguna.

3. No ponga más de una "X" en cada escala.

Por favor no se adelante ni vuelva a revisar los artículos o trate de memorizar como valuo artículos similares en la parte anterior del examen. Haga de cada artículo un fallo separado e independiente y trabaje rápidamente durante el examen. No tiene que preocuparse o complicarse sobre los artículos individuales. Sus primeras impresiones son las importantes. Eso si, por favor indique su fallo cuidadosamente para que los resultados indique sus verdaderas impresiones.

In the space below, you will find the facet of the study you are to judge:

THE ATLANTIC LIFE INSURANCE COMPANY OF MEXICO

With the Atlantic Company in mind, please fill out the evaluation scale below.

	Very	Closely	Slightly	Neutral	Slightly	Closely	Very	
BAD	_____	_____	_____	_____	_____	_____	_____	GOOD
CRUEL	_____	_____	_____	_____	_____	_____	_____	KIND
UNGRATEFUL	_____	_____	_____	_____	_____	_____	_____	GRATEFUL
SUCCESSFUL	_____	_____	_____	_____	_____	_____	_____	UNSUCCESSFUL
SKILLFUL	_____	_____	_____	_____	_____	_____	_____	BUNGLING
SOOTHING	_____	_____	_____	_____	_____	_____	_____	AGGRAVATING
NEGATIVE	_____	_____	_____	_____	_____	_____	_____	POSITIVE
DISREPUTABLE	_____	_____	_____	_____	_____	_____	_____	REPUTABLE
FOOLISH	_____	_____	_____	_____	_____	_____	_____	WISE
PLEASURABLE	_____	_____	_____	_____	_____	_____	_____	PAINFUL
OPTIMISTIC	_____	_____	_____	_____	_____	_____	_____	PESSIMISTIC
FRIENDLY	_____	_____	_____	_____	_____	_____	_____	UNFRIENDLY

En el espacio abajo, encontrará la fase del estudio que calificará:

LA COMPAÑÍA ATLÁNTICA DE SEGURO DE MÉXICO

Con la Compañía Atlántica de Seguro de México en consideración, por favor llene la escala de evaluación que sigue.

	Muy	Estre-	Ligera-	Neutral	Ligera-	Estre-	Muy
	chamente	mente			mente	chamente	
MALA	_____	_____	_____	_____	_____	_____	BUENA
CRUEL	_____	_____	_____	_____	_____	_____	BENÉVOLA
MALAGRADECIDA	_____	_____	_____	_____	_____	_____	AGRADECIDA
CON ÉXITO	_____	_____	_____	_____	_____	_____	SIN ÉXITO
HÁBIL	_____	_____	_____	_____	_____	_____	INEPTA
CALMADA	_____	_____	_____	_____	_____	_____	IRRITANTE
NEGATIVA	_____	_____	_____	_____	_____	_____	POSITIVA
DESACREDITADA	_____	_____	_____	_____	_____	_____	REPUTABLE
TONTA	_____	_____	_____	_____	_____	_____	SABIA
AGRADABLE	_____	_____	_____	_____	_____	_____	PENOSA
OPTIMISTA	_____	_____	_____	_____	_____	_____	PESIMISTA
AMISTOSA	_____	_____	_____	_____	_____	_____	INTRATABLE

In the space below, you will find the facet of the study you are to judge:

THE PACIFIC LIFE INSURANCE COMPANY OF MEXICO

With the Pacific Company in mind, please fill out the evaluation scale below.

	Very	Closely	Slightly	Neutral	Slightly	Closely	Very	
BAD	_____	:_____	:_____	:_____	:_____	:_____	:_____	GOOD
CRUEL	_____	:_____	:_____	:_____	:_____	:_____	:_____	KIND
UNGRATEFUL	_____	:_____	:_____	:_____	:_____	:_____	:_____	GRATEFUL
SUCCESSFUL	_____	:_____	:_____	:_____	:_____	:_____	:_____	UNSUCCESSFUL
SKILLFUL	_____	:_____	:_____	:_____	:_____	:_____	:_____	BUNGLING
SOOTHING	_____	:_____	:_____	:_____	:_____	:_____	:_____	AGGRAVATING
NEGATIVE	_____	:_____	:_____	:_____	:_____	:_____	:_____	POSITIVE
DISREPUTABLE	_____	:_____	:_____	:_____	:_____	:_____	:_____	REPUTABLE
FOOLISH	_____	:_____	:_____	:_____	:_____	:_____	:_____	WISE
PLEASURABLE	_____	:_____	:_____	:_____	:_____	:_____	:_____	PAINFUL
OPTIMISTIC	_____	:_____	:_____	:_____	:_____	:_____	:_____	PESSIMISTIC
FRIENDLY	_____	:_____	:_____	:_____	:_____	:_____	:_____	UNFRIENDLY

En el espacio abajo, encontrará la fase del estudio que calificará:

LA COMPAÑÍA PACÍFICA DE SEGURO DE MÉXICO

Con la Compañía Pacífica de Seguro de México en consideración, por favor llene la escala de evaluación que sigue.

	Muy	Estre-	Ligera-	Neutral	Ligera-	Estre-	Muy	
		chamente	mente		mente	chamente		
MALA	_____	:	_____	:	_____	:	_____	BUENA
CRUEL	_____	:	_____	:	_____	:	_____	BENÉVOLA
MALAGRADECIDA	_____	:	_____	:	_____	:	_____	AGRADECIDA
CON ÉXITO	_____	:	_____	:	_____	:	_____	SIN ÉXITO
HÁBIL	_____	:	_____	:	_____	:	_____	INEPTA
CALMADA	_____	:	_____	:	_____	:	_____	IRRITANTE
NEGATIVA	_____	:	_____	:	_____	:	_____	POSITIVA
DESACREDITADA	_____	:	_____	:	_____	:	_____	REPUTABLE
TONTA	_____	:	_____	:	_____	:	_____	SABIA
AGRADABLE	_____	:	_____	:	_____	:	_____	PENOSA
OPTIMISTA	_____	:	_____	:	_____	:	_____	PESIMISTA
AMISTOSA	_____	:	_____	:	_____	:	_____	INTRATABLE

APPENDIX C

SITUATION DESCRIPTIONS AND MESSAGE PRESENTATIONS USED IN THE EXPERIMENT

(Each page in English is followed
by its Spanish equivalent)

(In the experiment, students received each day
a situation description which they read first
and a letter message which they read last.)

Situation 1 (Atlantic Company)

Assume you applied for a 20 year payment, \$10,000 life insurance policy with the Atlantic Company. Ten days ago you filled out several forms to complete your application for coverage. Today, you receive this letter from the company.

Situación 1 (La Compañía Atlántica de Seguro de México)

Suponga que solicitó una póliza de seguro de vida de 20 años por la cantidad de \$125,000.00 (M.N.) con la Compañía Atlántica de Seguro de México. Hace diez días llenó varias formas para completar la solicitud respecto a la cobertura. Hoy usted recibe esta carta de la compañía.

Dear Policyholder:

In the next several days, you will receive your first \$10,000 life insurance policy with the Atlantic Insurance Company. With it come our guarantee of protection and security and wholehearted thanks for the confidence you've placed in us. Everyone here at the Atlantic Company welcomes every opportunity to serve you and to provide whatever assistance we can when you have insurance needs.

As you may know, life insurance creates a financial estate by an initial premium payment. This security should free your future from undue concern over financial protection. Giving you this protection and serving the general public are certainly our main goals here at the Atlantic Company.

The Atlantic Company is a stock life firm chartered in Mexico and dedicated to serving Mexicans, as efficiently as possible. You can be sure that our management personnel, technical staff, and company representatives in the field will guarantee that you'll receive the maximum in life insurance protection and service throughout your future as an Atlantic Company policyholder.

Besides the financial shelter your policy provides, you'll receive other life insurance features such as cash loans and surrender values. When you get your policy contract, read these important sections--they're added proof that the Atlantic Company supplies maximum insurance coverages.

Protecting your future, insuring your protection, guaranteeing our pledges--these are our promises to you for "life." We'll work diligently to make your future safe in the best insurable way.

Sincerely,

Luciano Flores

Estimado Asegurado:

En unos cuantos días más recibirá su primera póliza de seguro de vida por \$125,000.00 con la Compañía Atlántica de Seguro de México. Con ella va nuestra garantía de protección y seguridad, y nuestras cordiales gracias por la confianza que Ud. nos ha brindado. Todos aquí en la Compañía Atlántica agradeceremos cualquier oportunidad de servirlo y de proveerle cualquier asistencia que podamos, cuando tenga necesidad de seguro.

Como tal vez sepa, un seguro de vida crea un estado financiero con el pago inicial de prima. Esta seguridad debe liberar su futuro de preocupación innecesaria respecto a protección financiera. Darle esta protección y servir al público en general son ciertamente nuestras metas principales aquí en la Compañía Atlántica.

La Compañía Atlántica de Seguro de México es una sociedad anónima establecida en México y dedicada a servir a los Mexicanos tan eficientemente como sea posible. Puede estar seguro que nuestro personal administrativo, plantel técnico y representantes en el ramo le garantizan que recibirá lo máximo en protección de seguro de vida y servicio durante su futuro como asegurado en Compañía Atlántica.

Aparte del amparo financiero que su póliza le da, recibirá otras facilidades con su seguro de vida, como préstamos en efectivo y valores de renuncia. Cuando reciba su póliza lea las secciones relativas--son prueba adicional de que la Compañía Atlántica proporciona lo máximo de cobertura.

Proteger su futuro, asegurar su protección, garantizar nuestras ofertas, estas son nuestras promesas a usted por "vida." Trabajamos diligentemente para asegurar su futuro en la mejor manera.

Sinceramente,

Luciano Flores

Situation 1 (Pacific Company)

Assume you applied for a 20 year payment, \$10,000 life insurance policy with the Pacific Company. Ten days ago, you filled out several forms to complete your application for coverage. Today, you receive this letter from the company.

Situación 1 (La Compañía Pacífica de Seguro de México)

Suponga que solicito una póliza de seguro de vida de 20 años por la cantidad de \$125,000.00 con la Compañía Pacífica de Seguro de México. Hace diez días llenó varias formas para completar la solicitud respecto a la cobertura. Hoy usted recibe esta carta de la compañía.

Dear Policyholder:

Please be advised that you now have a policy with our company in the amount of \$10,000. We intend to keep our part of the bargain you have made with us; so, will you do your part, too?

Make sure you read your policy thoroughly. We find that this helps reduce misunderstandings later on. Also, note the face amount of your policy and when payments are due.

The Pacific Company is a stock life insurance company chartered in Mexico. We have many policyholders and a large management and technical staff. We're a reputable firm; so you don't have to worry about us standing behind our commitments.

If there is anything you need to, please do not hesitate to ask.

Sincerely,

Luciano Flores

Estimado Asegurado:

Deseamos avisarle que ya cuenta usted con una póliza con nuestra compañía por la cantidad de \$125,000.00. Es nuestra intención cumplir con nuestra parte del acuerdo que ha hecho con nosotros, ¿hará usted su parte también?

Asegúrese de leer la póliza entera. Encontramos que esto ayuda a reducir malentendidos después. También, tome nota del importe nominal de su póliza y de cuándo se vencen los pagos.

La Compañía Pacífica de Seguro de México es una sociedad anónima de seguros de vida establecida legalmente en México. Tenemos muchos asegurados y un amplio personal de gerencia y plantel técnico. Somos una firma respetable, así que no tiene que preocuparse de que cumplamos nuestros compromisos.

Si desea saber algo, por favor no dude en preguntarnos.

Sinceramente,

Luciano Flores

Situation 2 (Atlantic Company)

When you first took out your insurance policy with the Atlantic Company you named your parents as beneficiaries. Although you presently want to keep the policy contract as it is, you might want to change the beneficiary someday. Thus, you wrote to the Atlantic Company asking them if it would be possible to change the designated beneficiaries on your policy at some future time. This letter answers your questions concerning a change in beneficiary.

Situación 2 (La Compañía Atlántica de Seguro de México)

Cuando sacó originalmente su póliza de seguros con la Compañía Atlántica de Seguro de México, nombré a sus padres como beneficiarios. Aunque a actualmente desea mantener la póliza como está, quizá quiera cambiar el beneficiario algún día. Por lo tanto, le escribí a la Compañía Atlántica preguntándole si sería posible cambiar la designación de los beneficiarios de su póliza en algún tiempo futuro. Esta carta contesta sus preguntas con referencia a cambio de beneficiario.

Dear Policyholder:

Subject: Procedure for Changing Your Beneficiary

Yes, you may change your original beneficiary or also any future beneficiaries as long as your policy remains free from creditor assignment.

As you probably know, your insurance policy is a contract, and the assignment of new beneficiaries is a right that we here at the Atlantic Company always respect. The only thing we request is that you follow our standard company procedure in amending your original contract.

Whenever you decide to substitute another beneficiary to your policy, just notify us in writing and send us your policy contract. We'll endorse the beneficiary and send the contract right back to you in a very few days.

Serving you is a genuine pleasure at the Atlantic Company. You can be sure that we'll always stand ready to assist you whenever the occasion arises.

Sincerely,

Antonio Rodriguez

Estimado Asegurado:

Asunto: Procedimiento para cambiar su beneficiario

Sí, puede cambiar su beneficiario original o también cualquier beneficiario futuro, siempre y cuando su póliza quede libre de gravámenes de crédito.

Como probablemente sabe, su póliza de seguro es en contrato, y la asignación de beneficiarios nuevos es un derecho que nosotros aquí en la Compañía Atlántica de Seguro de México siempre respetamos. Lo único que requerimos es que siga nuestro procedimiento regular para enmendar el contrato original.

Cuando desee substituir algún otro beneficiario a su póliza, nada más notifiquenos por escrito y mandenos la póliza. Haremos el endoso de beneficiario y le devolveremos su póliza en muy pocos días.

Servirlo es un placer genuino para la Compañía. Puede estar seguro que siempre estaremos listos para asistirlo cuando surja la ocasión.

Sinceramente,

Antonio Rodriguez

Situation 2 (Pacific Company)

When you first took out your insurance policy with the Pacific Company, you named your parents as beneficiaries. Although you presently want to keep the policy contract as it is, you might want to change the beneficiary someday. Thus, you wrote to the Pacific Company asking them if it would be possible to change the designated beneficiaries on your policy at some future time. This letter answers your questions concerning a change in beneficiary.

Situación 2 (La Compañía Pacífica de Seguro de México)

Cuando sacó originalmente su póliza de seguros con la Compañía Pacífica de Seguro de México, nombró a sus padres como beneficiarios. Aunque actualmente desea mantener la póliza como está, quizás quiera cambiar el beneficiario algún día. Por lo tanto, le escribió a la Compañía Pacífica preguntándole si sería posible cambiar la designación de los beneficiarios de su póliza en algún tiempo futuro, Esta carta contesta sus preguntas con referencia a cambio de beneficiarios.

Dear Policyholder:

Subject: Procedure for Changing Your Beneficiary

As you should know, your insurance is a contract and we are bound by law to honor what you think is best concerning changes in beneficiaries. However, we can't change any beneficiary if you're in debt and have assigned your policy to some creditor.

We require that you make any and all requests in writing. Too, you are required to send us the policy so we can type in another name. This is our policy at the Pacific Company.

Hoping that we have given you the information you wanted in regard to this matter, I remain,

Sincerely,

Antonio Rodriguez

Estimado Asegurado:

Asunto: Procedimiento para cambiar su beneficiario

Como ha de saber, su seguro es en contrato y estamos obligados por ley a aceptar lo que usted considere sea mejor con referencia a cambios de beneficiarios. Sin embargo, no podemos cambiar el beneficiario si usted se encuentra en deuda y ha comprometido su póliza con algún acreedor.

Es un requisito que haga cualquier y todas sus peticiones por escrito. También es necesario que nos mande la póliza para poder escribir el otro nombre. Este es nuestro sistema en Compañía Pacífica de Seguro de México.

Esperando haberle dado la información que deseaba con referencia al asunto, quedo,

Sinceramente,

Antonio Rodriguez

Situation 3 (Atlantic Company)

Assume that the premium payments on your \$10,000 life insurance are payable four times a year. Last quarter you mailed the Atlantic Company a check as usual for \$30.00-- the regular quarterly payment on your policy. The Atlantic Company mailed you a short note saying that they had not received your payment. You wrote back to the Atlantic Company telling that you did mail a check for the correct amount due. For some reason the company has no record of your premium. (Perhaps someone along the line, either the mail service or the company, misplaced the check.) Shortly after you mailed your letter to the company, you receive this communication.

Situación 3 (La Compañía Atlántica de Seguro de México)

Suponga que el pago de prima en su seguro de vida por \$125,000.00 es pagadero cuatro veces al año. El último pago lo mandó usted a la Compañía Atlántica de Seguro de México, como de costumbre por \$375.00--siendo el acostumbrado pago trimestral sobre su póliza. La Compañía Atlántica de Seguro de México le mandó un recordatorio diciendo que no han recibido su pago. Usted le escribió a Compañía Atlántica diciéndoles que ya les había mandado un cheque por la cantidad exacta. Por alguna razón la compañía no tiene anotación de su prima. (Quizás alguien en el proceso, ya sea en el correo o la compañía, traspapeló el cheque.) Poco después de que usted le mandó su carta a la compañía recibió esta comunicación.

Dear Policyholder:

To give you insurance protection and to serve our policy-holders well are certainly our primary goals here at the Atlantic Company.

When we notice a missing premium payment, we're concerned, of course, because we know that your policy contract is a most important part of your financial estate. The most important thing to both of us is maintaining your full insurance coverage.

In this same spirit of mutual interest, would you please send us another check for your \$30.00? By stopping payment on your previous check and sending us another one for the same amount, you'll continue to receive \$10,000 of life insurance protection.

When you have insurance needs, we hope you'll look to the Atlantic Company where "service" and "protection" for each policyholder are more than just words.

Sincerely,

Jesus Guerrero

Estimado Asegurado:

Darle a usted protección de seguro y servir a nuestros asegurados bien son ciertamente nuestras metas principales aquí en la Compañía Atlántica de Seguro de México.

Cuando nos damos cuenta de que falta un pago de prima, nos preocupamos, por supuesto, porque sabemos que el contrato de su póliza es una parte muy importante de su estado financiero. Lo más importante para ambos es mantener su seguro en vigor.

Con este mismo espíritu de interés mutuo quiere por favor mandarnos otro cheque por \$375.00? Cancelando su cheque anterior y mandandonos otro por la misma cantidad, usted continuará recibiendo \$125,000.00 de protección en seguro de vida.

Cuando tenga necesidad de seguro, esperamos que busque a la Compañía Atlántica de Seguro de México en donde "servicio" y "protección" para cada asegurado son más que solo palabras.

Sinceramente,

Jesus Guerrero

Situation 3 (Pacific Company)

Assume that the premium payments on your \$10,000 life insurance policy are payable four times a year. Last quarter you mailed the Pacific Company a check as usual for \$30.00--the regular quarterly payment on your policy. The Pacific Company mailed you a short note saying that they had not received your payment. You wrote back to the Pacific Company telling that you did mail a check for the correct amount due. For some reason the company has no record of your premium. (Perhaps someone along the line, either the mail service or the company, misplaced the check.) Shortly after you mailed your letter to the company, you receive this communication.

Situación 3 (La Compañía Pacífica de Seguro de México)

Suponga que el pago de prima en su seguro de vida por \$125,000.00 es pagadero cuatro veces al año. El último pago lo mandó usted a la Compañía Pacífica de Seguro de México, como de costumbre, por \$375.00--siendo el acostumbrado pago trimestral sobre su póliza. Compañía Pacífica de Seguro de Mexico le mandó un recordatorio diciendo que no han recibido su pago. Usted le escribió a Compañía Pacífica diciéndole que ya le había mandado un cheque por la cantidad exacta. Por alguna razón la compañía no tiene anotación de su prima. (Quizás alguien en el proceso, ya sea en el correo o la compañía, traspapeló el cheque.) Poco después de que usted le mandó su carta a la compañía recibió esta comunicación.

Dear Policyholder:

We have no record of receiving your premium payment this quarter. If you want to retain your policy in force, you'll have to send us another check.

Regardless of why we didn't receive payment, you must realize that for us to continue insuring you we must have your payment.

Knowing that you will understand the seriousness of this matter and that you will send us your check immediately, I am,

Sincerely,

Jesus Guerrero

Estimado Asegurado:

No tenemos anotación de haber recibido pago de su prima este trimestre. Si desea retener su póliza en vigor, tendrá que mandarnos otro cheque.

Sin considerar porqué no recibimos el pago, usted debe comprender que para que nosotros podamos continuar asegurándolo debemos tener su pago.

Sabiendo que usted entenderá la seriedad de este asunto y que nos mandará su cheque inmediatamente, quedo.

Sinceramente,

Jesus Guerrero

Situation 4 (Atlantic Company)

Assume that your third quarterly insurance premium for this year was due two weeks ago. Since you know that your policy has a 31-day grace clause, you're not worried too much about losing your coverage. However, today you receive this letter from the Atlantic Company.

Situacion 4 (La Compañía Atlántica de Seguro de México)

Suponga que su tercer pago de prima trimestral de su seguro por este año se venció hace dos semanas. Como usted sabe que su póliza tiene un período de gracia de 31 días no está demasiado preocupado de perder su vigencia. Sin embargo, hoy recibe esta carta de la Compañía Atlántica de Seguro de México.

Dear Policyholder:

Today is tomorrow's yesterday; so forward-looking businesses, like forward-looking people, should plan their futures through the present, shouldn't they?

That's why we here at the Atlantic Company think your insurance protection is so vitally important--because it protects you now (today!) and for many tomorrows, too. For some reason, we haven't received your premium payment this quarter. For you to maintain the active status of your coverage, will you send us your check for \$30.00? You may use the enclosed addressed envelope for return mailing.

Your prompt check today will make your insurance protection not only a promise of the future, but a reality of the present.

Sincerely,

Jorge Ybarra

Estimado Asegurado:

Para asegurarse un futuro feliz las empresas audaces y la gente deben planear su futuro actuando en el present ¿verdad?

Por esta razón nosotros aquí en la Compañía Atlántica de Seguro de México pensamos que su protección de seguro es de vital importancia--porque lo protege a usted ahorita (hoy!) y por muchos mañanas, también. Por alguna razón no hemos recibido su pago de prima por este trimestre. Para que usted mantenga su vigencia en estado activo, ¿nos quiere mandar su cheque de \$375.00? Puede usar el sobre ya dirigido aquí adjunto.

Su cheque puntual hoy hará su protección de seguro no sólo una promesa del futuro, sino una realidad del presente.

Sinceramente,

Jorge Ybarra

Situation 4 (Pacific Company)

Assume that your third quarterly insurance premium for this year was due two weeks ago. Since you know that your policy has a 31-day grace clause, you're not worried too much about losing your coverage. However, today you receive this letter from the Pacific Company.

Situación 4 (La Compañía Pacífica de Seguro de México)

Suponga que el tercer pago de prima trimestral de su seguro por este año se venció hace dos semanas. Como usted sabe que su póliza tiene un período de gracia de 31 días no está demasiado preocupado de perder su vigencia. Sin embargo, hoy recibe esta carta de la Compañía Pacífica de Seguro de México.

Dear Policyholder:

Please be informed that our files tell us we have no record of your third payment for coverage this year. Regarding same, we beg to advise that even though you have a grace period of said 31 days, we must have payment before said time expires; otherwise your policy will lapse which is unduly unfortunate for you because you will have no protection.

Please find enclosed herewith an envelope for payment. Make your check for the correct amount and return at once. In connection therewith, also make future payments on time.

Awaiting your reply, I am,

Sincerely,

Jorge Ybarra

Estimado Asegurado:

Deseo informarle que nuestros archivos nos indican que no tenemos anotación de su tercer pago para cobertura de este año. Con referencia al mismo, deseamos avisarle que aunque tiene un período de gracia de 31 días, debemos recibir el pago antes de que expire dicho período; de otra manera su póliza será suspendida, lo cual sería innecesariamente desastroso para usted, ya que quedaría sin protección.

Le adjuntamos un sobre para su pago. Haga su cheque por la cantidad correcta y envíelo en seguida. Con relación a lo mismo, haga sus pagos futuros a tiempo.

Esperando su respuesta, quedo,

Sinceramente,

Jorge Ybarra

Situation 5 (Atlantic Company)

Assume that you requested an additional insurance policy for \$5,000 from the Atlantic Company after deciding you need more insurance coverage. You completed the necessary application forms and had a medical examination. It has been three weeks since you mailed the information to the company. Today you receive this letter.

Situación 5 (La Compañía Atlántica de Seguro de México)

Suponga que usted pidió una póliza adicional por la cantidad de \$62,500.00 a la Compañía Atlántica de Seguro de México después de decidir que usted necesitaba más cobertura. Llenó las formas de solicitud necesarias y se hizo un examen médico. Han pasado tres semanas desde que usted mandó la información a la compañía. Hoy recibe esta carta.

Dear Policyholder:

When we received your request for additional insurance coverage, our technical staff went immediately to work studying your request. You can be sure that the Atlantic Company always gives prompt and detailed attention to servicing requests for insurance protection.

Granting an insurance contract, as you probably know, occurs only after careful and systematic consideration of the many reports on each applicant. These high underwriting standards protect our present policyholders as well as future ones.

Our staff gave special thought to your request because we always try to consider each case on its own merit. At this time, we can only continue to maintain your existing policy in force. Your present coverage will still, however, be the guardian of your safety and protection in years ahead.

Fair-minded treatment and individual attention are what you always receive at the Atlantic Company. In this way, you're guaranteed quality service in all life insurance coverages.

Sincerely,

Arnulfo Talamantes

Estimado Asegurado:

Cuando recibimos su solicitud para aumentar la cobertura póliza, nuestro personal técnico inmediatamente hizo un estudio de su pedimento. Puede estar seguro de que la Compañía Atlántica de Seguro de México siempre da rápida y detallada atención para atender las peticiones para protección en seguros.

Otorgar un contrato de seguro, como usted lo ha de saber, ocurre sólo después de una sistemática y cuidadosa consideración de los muchos informes sobre cada solicitante. Estas elevadas normas protegen a nuestros asegurados actuales, así como a los futuros.

Nuestro personal dio especial consideración a su solicitud porque siempre tratamos de considerar cada caso por su propio mérito. Al momento solamente podemos continuar manteniendo su póliza actual, en vigor. Su seguro actual sin embargo, será el guardián de su seguridad y protección en los años venideros.

Trato equitativo y atención individual es lo que siempre recibirá con la Compañía Atlántica de Seguro de México. De esta manera está garantizado servicio de calidad en todos los seguros de vida.

Sinceramente,

Arnulfo Talamantes

Situation 5 (Pacific Company)

Assume that you requested an additional insurance policy for \$5,000 from the Pacific Company after deciding you need more insurance coverage. You completed the necessary application forms and had a medical examination. It has been three weeks since you mailed the information to the company. Today you receive this letter.

Situación 5 (La Compañía Pacífica de Seguro de México)

Suponga que usted pidió una póliza adicional por la cantidad de \$62,500.00 a la Compañía Pacífica de Seguro de México después de decidir que usted necesitaba más cobertura. Llenó las formas de solicitud necesarias y se hizo un examen médico. Han pasado tres semanas desde que usted mandó la información a la compañía. Hoy recibe esta carta.

Dear Policyholder:

Although we would like to, we cannot extend the additional \$5,000 policy contract to you. Your medical exam showed that you are not in the best of physical condition; thus, we must reject your application.

Knowing that you will understand our decision on this matter, I am,

Sincerely,

Arnulfo Talamantes

Estimado Asegurado:

Aunque nos gustaría, no podemos ofrecerle el contrato de póliza por \$62,500.00 adicionales. Su examen médico indicó que no se encuentra en las mejores condiciones físicas, por lo tanto tenemos que rechazar su solicitud.

Sabiendo que usted entenderá nuestra decisión en esta cuestión, quedo,

Sinceramente,

Arnulfo Talamantes

APPENDIX D

MEMORANDUM SENT TO PROFESSORS OF THE EXPERIMENTAL GROUPS EXPLAINING PROCEDURE USED IN THE CONDUCT OF THE STUDY

(English version followed by Spanish equivalent)

To: Professor Alfredo Brunell
Professor Alicia Brunell
Professor Gonzalo Treviño
Professor Ernesto Delgado

From: Jack D. Eure, Jr.

Subject: Explanation of Procedure for Dissertation Study

I'm certainly grateful to each of you for helping me conduct this study. Hopefully, it will tell me some interesting things about reactions to written communications.

When you administer the study, would you please note the following points:

1. Before you pass out the first series of letters, please read to each class the "Instructions To All Students."
2. After you have read the "Instructions To All Students," pass out the first series of letters. Ask each class to read the material in the order it is given to them. They will receive 2 sheets stapled together. The first is a situation and the following one is a letter. Again, they are to read the situation first, then turn to the letter following the situation and read it last. Please allow the students 2 to 3 minutes to read the material. (I don't think it will take longer than this.)

When everyone has finished reading the material, please have them pass it in. (I'd appreciate it if they wouldn't mark on any of the material they read.) After you have collected the reading materials, have each class member write a one paragraph opinion of the company--not the product or the writer of the letter, but the company. Allow 1 to 2 minutes for this; then have the students put their names, course number and section number on the papers and collect them. I will collect the printed material and student opinions from you after each class.

While each student is reading the handouts, would you please check the roll on the special sheets I have made? I need to know which students have missed which exposures, so that I can make these up in future class meetings.

One more point--if you have students who have participated in the study in a previous class, please exempt them in your class (example--a student meeting a class at 3:00 p.m. who has

participated in another class at 10:00 a.m., previously, is exempted.) These students might study their lesson for the day while others are participating in the exercise.

Recapping the conduct of the study briefly, here is what you should do:

1. Read "Instructions" to class
2. Pass out materials
3. Check roll
4. Collect handouts
5. Have students write opinions of the company
6. Collect papers
7. Hold handouts and papers for me to pick up

Again, my wholehearted thanks go to each of you for your help. I hope the study provides some interesting conclusions.

Para: Profesor Alfredo Brunell
 Profesor Alicia Brunell
 Profesor Gonzalo Treviño
 Profesor Ernesto Delgado

De: Jack D. Eure, Jr.

Asunto: Explicación del procedimiento para un estudio de
 disertación

Les estoy muy agradecido a cada uno de ustedes por ayudarme a realizar este estudio. Espero que el estudio me diga algunas cosas interesantes sobre las reacciones a la comunicación por escrito.

Cuando administren el estudio, por favor tomen nota de los siguientes puntos.

1. Antes de distribuir la primera serie de cartas, por favor lean a cada clase las "Instrucciones a Todos los Estudiantes."
2. Después de que lean las "Instrucciones a Todos los Estudiantes" repartan la primera serie de cartas. Piden a cada clase que lea el material en el orden que se les reparta. Recibirán dos hojas engrapadas. La primera plantea una situación y la siguiente es una carta. Aquí también deben leer la situación primero y seguir con la carta, leyéndola al último. Por favor permítalos a los estudiantes de 2 a 3 minutos para leer el material. (No creo que tome más tiempo que esto.)

Cuando todos hayan terminado de leer el material, por favor pidan que se lo entreguen a Ud. (Le agradecería que no marcaran el material que leer.) Después de que hayan recogido el material de lectura, pidan a cada alumno que escriba un párrafo con su opinión de la compañía--no sobre el resultado ni el autor de la carta, sino sobre la compañía. Permitan 1 o 2 minutos para esto; después pidan que los estudiantes pongan su nombre, el numero del curso y de la sección en los papeles y recojalos. Yo recogeré el material impreso y las opiniones de los estudiantes después de cada clase.

Cuando un estudiante, esté ausente en cualquier día del experimento, permítalo terminar la parte que no hizo tan pronto como regrese a clase.

Una cosa más--si ha tenido estudiantes que han participado en el estudio en una clase anterior, por favor exéntelos de su clase (por ejemplo--un estudiante asistiendo a una clase a las 3:00 p.m. que ha participado en otro clase a las 10:00 a.m.

anteriormente, está exento.) Estos estudiantes podrían repasar su lección del día mientras los demás participan en el ejercicio.

Recapitulando el procedimiento del estudio brevemente, lo siguiente es lo que se debe hacer:

1. Leer las instrucciones a la clase.
2. Repartir el material.
3. Tomar lista de asistencia.
4. Recoger los volantes.
5. Pedir que los estudiantes escriban opiniones sobre la compañía.
6. Recoger los papeles.
7. Guardar los volantes y papeles para que yo los recoja después.

Nuevamente, les doy mis más cordiales gracias a cada uno de ustedes por su ayuda. Espero que el estudio proporcione unas conclusiones interesantes.

APPENDIX E

INSTRUCTIONS READ TO EACH EXPERIMENTAL GROUP PRIOR TO THE
ACTUAL CONDUCT OF THE EXPERIMENT

(English version followed by Spanish equivalent)

Instructions To All Students

You are asked to join in a business study for the next 6 successive class meetings. If you have had a college course in business letter writing, you may be exempted from this study. If you have participated in a previous class, you do not have to participate in this one. Also, please do not participate if you speak, read or write English fluently.

The study will take only a few minutes of each class meeting to complete. It will be conducted each day while your instructor checks the roll. Please try to be present each day so that the results of this study will be representative.

You will be asked to put your name on short papers that you will write each day; however, the results of this study are confidential and the responses you give will become summary tables in which no names will be given.

Your efforts and full cooperation in this study will advance the current thinking and development of many business ideas. Thank you very much.

Instrucciones a Todos los Estudiantes

Se les pide que participen en un estudio de empresas durante las siguientes cinco reuniones de clase. Si han tomado un curso en la escuela superior sobre correspondencia comercial, pueden excusarse este estudio. Si han participado en una clase anterior, no tienen que participar en esta. También, por favor no participen en el estudio si hablan, leer o escriben inglés con facilidad.

Este estudio tomará sólo unos minutos de cada reunión de clase para completarse. Será conducido cada día mientras su instructor toma lista. Por favor traten de asistir diariamente para que los resultados de este estudio sean representativos.

Se les pedirá que pongan su nombre en los papeles que escribirán cada día, sin embargo, los resultados de este estudio son confidenciales y las respuestas que den serán parte del sumario en el cual no aparecerán nombres.

Sus esfuerzos y completa cooperación en este estudio adelantará la manera del pensar actual y el desarrollo de muchas ideas empresariales. Muchas gracias.

APPENDIX F

VARIANCES FOR SEMANTIC SCALES

TABLE VI
 VARIANCES¹ FOR SEMANTIC SCALES BY GROUPS

Semantic	<u>Group 1</u>	<u>Group 2</u>	<u>Group 3</u> Company Pacifica	Company Atlantica
1	105.90	137.37	135.37	79.42
2	80.99	107.19	87.67	61.80
3	110.43	228.86	125.59	54.76
4	172.99	252.89	173.90	157.90
5	175.87	162.76	108.43	120.94
6	111.97	211.52	139.42	84.89
7	67.54	143.87	99.52	51.44
8	99.19	101.22	159.54	81.95
9	115.19	79.49	111.75	82.15
10	77.52	109.44	81.22	73.67
11	201.09	139.54	129.49	56.30
12	54.08	60.15	104.99	26.71

¹Variance scores were computed by the following formula:

$$V = \sum (X - \bar{X})^2, \text{ where}$$

X = each subject response, and

\bar{X} = average scales response for a given group

APPENDIX G
MEAN VALUES FOR SEMANTIC SCALES

TABLE VII
MEAN VALUES FOR SEMANTIC SCALES BY GROUPS

Semantic	<u>Group 1</u>	<u>Group 2</u>	<u>Group 3</u>	
			Company Pacifica	Company Atlantica
1	2.43	5.43	2.23	6.27
2	2.47	4.90	1.99	5.95
3	2.54	5.16	2.24	6.20
5	5.76	2.20	5.72	1.75
6	5.73	2.82	6.11	1.96
7	2.18	5.28	2.08	6.33
8	2.92	5.58	2.90	5.97
9	2.51	5.56	2.10	5.81
10	5.58	2.33	5.82	1.53
11	5.44	1.92	5.68	1.71
12	5.99	1.81	6.35	1.30

APPENDIX H

T VALUES FOR TESTS IN THE EXPERIMENT

TABLE VIII

T VALUES BY ADJECTIVE PAIRS RELATIVE TO COMPANY ATLANTICA
AND PACIFICA IN GROUP 3 COMPARED TO .05 AND .01 LEVELS
OF SIGNIFICANCE AS A BASE FOR DETERMINING THE
SIGNIFICANCE OF THE DIFFERENCES BETWEEN
MEAN SEMANTIC RESPONSES

Semantic	T Value	T Value Higher Than Critical "t" Value at .05 Level of Significance ¹	T Value Higher Than Critical "t" Value at .01 Level of Significance ²
1	18.50	yes	yes
2	15.49	yes	yes
3	12.89	yes	yes
5	4.27	yes	yes
6	.39	no	no
7	24.53	yes	yes
8	13.75	yes	yes
9	12.40	yes	yes
10	5.43	yes	yes
11	3.76	yes	yes
12	- 4.87	yes	yes

¹Critical "t" value at .05 level of significance
 ± 1.960

²Critical "t" value at .01 level of significance
 ± 2.576

Degrees of Freedom: $n_1 + n_2 - 2 = 79 + 79 - 2 = 156$

TABLE IX

T VALUES BY ADJECTIVE PAIRS RELATIVE TO GROUP 1 AND
GROUP 2 COMPARED TO .05 AND .01 LEVELS OF
SIGNIFICANCE AS A BASE FOR DETERMINING THE
SIGNIFICANCE OF THE DIFFERENCES
BETWEEN MEAN SEMANTIC RESPONSES

Semantic	T Value	T Value Higher Than Critical "t" Value at .05 Level of Significance ¹	T Value Higher Than Critical "t" Value at .01 Level of Significance ²
1	-15.51	yes	yes
2	-14.98	yes	yes
3	-12.36	yes	yes
5	- 4.21	yes	yes
6	- .38	no	no
7	-17.15	yes	yes
8	-14.33	yes	yes
9	-13.45	yes	yes
10	- 5.51	yes	yes
11	- 3.15	yes	yes
12	7.70	yes	yes

¹Critical "t" value at .05 level of significance
 ± 1.960

²Critical "t" value at .01 level of significance
 ± 2.576

Degrees of Freedom: $n_1 + n_2 - 2 = 79 + 79 - 2 = 156$

TABLE X

T VALUES BY ADJECTIVE PAIRS RELATIVE TO COMPANY ATLANTICA
IN GROUP 3 AND GROUP 2 COMPARED TO .05 AND .01 LEVELS
OF SIGNIFICANCE AS A BASE FOR DETERMINING THE
SIGNIFICANCE OF THE DIFFERENCES BETWEEN MEAN
SEMANTIC RESPONSES

Semantic	T Value	T Value Higher Than Critical "t" Value at .05 Level of Significance ¹	T Value Higher Than Critical "t" Value at .01 Level of Significance ²
1	4.60	yes	yes
2	10.34	yes	yes
3	9.75	yes	yes
5	5.20	yes	yes
6	2.88	yes	yes
7	9.37	yes	yes
8	8.54	yes	yes
9	8.31	yes	yes
10	5.29	yes	yes
11	6.00	yes	yes
12	5.10	yes	yes

¹Critical "t" value at .05 level of significance
 ± 1.960

²Critical "t" value at .01 level of significance
 ± 2.576

Degrees of Freedom: $n_1 + n_2 - 2 = 79 + 79 - 2 = 156$

TABLE XI

T VALUES BY ADJECTIVE PAIRS RELATIVE TO COMPANY PACIFICA
IN GROUP 3 AND GROUP 1 COMPARED TO .05 AND .01
LEVELS OF SIGNIFICANCE AS A BASE FOR DETERMINING
THE SIGNIFICANCE OF THE DIFFERENCES
BETWEEN MEAN SEMANTIC RESPONSES

Semantic	T Value	T Value Higher Than Critical "t" Value at .05 Level of Significance ¹	T Value Higher Than Critical "t" Value at .01 Level of Significance ²
1	1.13	no	no
2	4.01	yes	yes
3	4.89	yes	yes
5	5.03	yes	yes
6	3.39	yes	yes
7	4.94	yes	yes
8	4.41	yes	yes
9	6.63	yes	yes
10	5.07	yes	yes
11	3.53	yes	yes
12	3.12	yes	yes

¹Critical "t" value at .05 level of significance
 ± 1.960

²Critical "t" value at .01 level of significance
 ± 2.576

Degrees of Freedom: $n_1 + n_2 - 2 = 79 + 79 - 2 = 156$

TABLE XII

T VALUES BY ADJECTIVE PAIRS RELATIVE TO COMPANY PACIFICA
IN GROUP 3 AND COMPANY ATLANTICA, GROUP 2 COMPARED
TO .05 AND .01 LEVELS OF SIGNIFICANCE AS A BASE
FOR DETERMINING THE SIGNIFICANCE OF THE
DIFFERENCES BETWEEN MEAN SEMANTIC RESPONSES

Semantic	T Value	T Value Higher Than Critical "t" Value at .05 Level of Significance ¹	T Value Higher Than Critical "t" Value at .01 Level of Significance ²
1	-15.20	yes	yes
2	-14.02	yes	yes
3	-11.98	yes	yes
5	- 3.23	yes	yes
6	1.93	no	no
7	-11.55	yes	yes
8	-14.67	yes	yes
9	-13.42	yes	yes
10	- 5.19	yes	yes
11	- 2.31	yes	yes
12	12.23	yes	yes

¹Critical "t" value at .05 level of significance
 ± 1.960

²Critical "t" value at .01 level of significance
 ± 2.576

Degrees of Freedom: $n_1 + n_2 - 2 = 79 + 79 - 2 = 156$

TABLE XIII

T VALUES BY ADJECTIVE PAIRS RELATIVE TO COMPANY ATLANTICA
IN GROUP 3 AND COMPANY PACIFICA, GROUP 1 COMPARED TO
.05 AND .01 LEVELS OF SIGNIFICANCE AS A BASE FOR
DETERMINING THE SIGNIFICANCE OF THE DIFFERENCES
BETWEEN MEAN SEMANTIC RESPONSES

Semantic	T Value	T Value Higher Than Critical "t" Value at .05 Level of Significance ¹	T Value Higher Than Critical "t" Value at .01 Level of Significance ²
1	23.44	yes	yes
2	16.59	yes	yes
3	12.97	yes	yes
5	4.90	yes	yes
6	1.71	no	no
7	28.06	yes	yes
8	13.37	yes	yes
9	12.50	yes	yes
10	5.65	yes	yes
11	4.23	yes	yes
12	- 2.75	yes	yes

¹Critical "t" value at .05 level of significance
 ± 1.960

²Critical "t" value at .01 level of significance
 ± 2.576

Degrees of Freedom: $n_1 + n_2 - 2 = 79 + 79 - 2 = 156$

VITA

Jack Douglas Eure, Jr., was born on April 9, 1943, in Vernon, Texas, the son of Elizabeth and Jack Douglas Eure. Upon graduating from Vernon High school, Vernon, Texas, in 1961, he entered North Texas State University and received the degree of Bachelor of Business Administration in May, 1965. During his senior year, he was named "Outstanding Management Student--1965."

In the fall of that year he began work for Gulf Oil Company in Evansville, Indiana, in the business administration training program. After a year of practical working experience, he returned to North Texas State University in 1966 to enter graduate school. Receiving a Master of Business Administration degree in Management in August, 1967, he joined Southwestern Bell Telephone Company, holding management jobs in the traffic department in Uvalde, San Antonio and Austin, Texas.

In September, 1967 he joined the Business Administration Department at Southwest Texas State University, teaching courses in business communication and management. He entered the Graduate School at Louisiana State University in June, 1971, majoring in management and serving as a graduate assistant. Finishing course requirements for the Doctor of Philosophy degree in Management in May, 1973, he is now a candidate for that degree.

He is married to the former Suzanne Thomas of Vernon, Texas, and they have one son, Jack Douglas Eure, III.

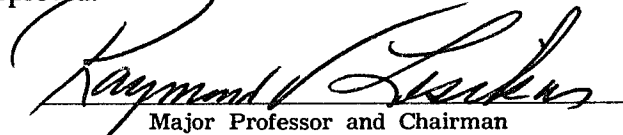
EXAMINATION AND THESIS REPORT

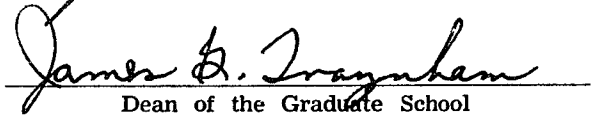
Candidate: Jack Douglas Eure, Jr.

Major Field: Management

Title of Thesis: Applicability of Selected American Written Business
Communication Principles Across Cultural Boundaries
With Particular Reference to Mexico

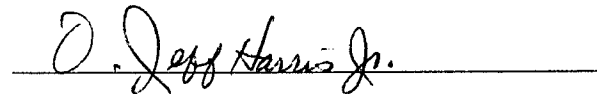
Approved:

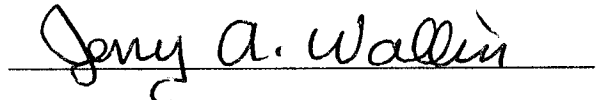

Major Professor and Chairman

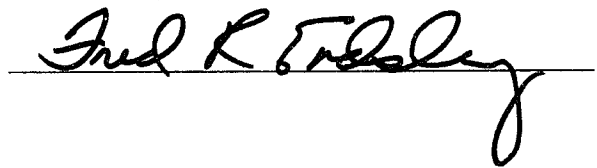

Dean of the Graduate School

EXAMINING COMMITTEE:









Date of Examination:

May 9, 1975